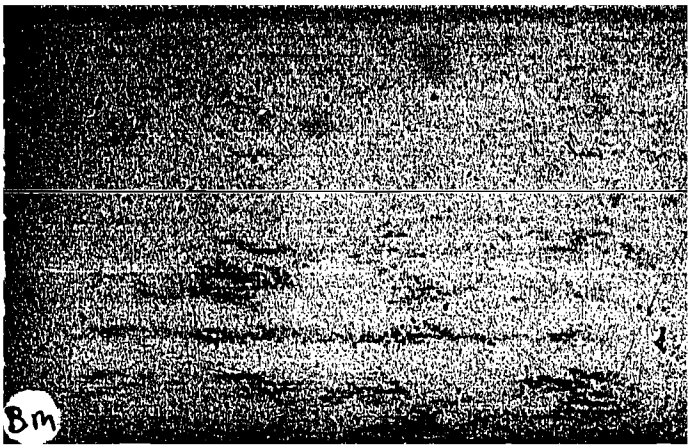
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DOCUMENT RESUME

ED 173 943 EA 011 959

TITLE	MCPS Comprehensive Planning Process.
INSTITUTION	Montgomery County Public Schools, Rockville, Md.
PUB DATE	79
NOTE	271p.; Occasional pages may be marginally legible due to light print
EDRS PRICE	MF01/PC11 Plus Postage.
DESCRIPTORS	Developmental Programs; *Educational Assessment; Educational Development; *Educational Planning; Elementary Secondary Education; *Needs Assessment; Pilot Projects; Program Development; Program Evaluation
IDENTIFIERS	*Comprehensive Planning Process; Montgomery County Public Schools MD

ABSTRACT

Several working papers and a guidebook to the Comprehensive Planning Process of Maryland's Montgomery County Public Schools have been collected to form this document. The process itself was developed in 1979 and will be pilot-tested during the 1981 fiscal year. These materials, therefore, constitute an interim report on a process yet to be cast in final form. The program itself is divided into six stages and subdivided into twenty-one steps, covering the following areas: needs assessment; needs prioritization; development of measurable objectives; generation of alternative plans for meeting objectives; selection of preferred plans; integration and reconciliation of plans selected by different organizational units in the system; implementation, evaluation, and recycling of plans; and correlation of the implementation activities with budget development. The process is intended for use at every level of the system and by every organizational unit within the system. Included in the document are a conceptual overview, planning materials for developing school information summaries at the elementary, junior high, and high school levels, a discussion of and planning materials for needs assessment, a guide for planner supervisors, and a guidebook for the planning and implementation team, as well as supplementary information and sample forms. (PGD)

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ED173943

Montgomery County Public Schools

MCPS COMPREHENSIVE PLANNING PROCESS

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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1979-80

Major Purpose:

To improve educational opportunities for students through increasing management effectiveness and efficiency focusing upon planning for FY 81.

Anticipated Results:

Besides generally improved planning, the results anticipated initially include (a) a reduction in the number of MCPS priorities and (b) an improvement in the integration of planning among organizational levels and units (by clarifying how units plan, the means for influencing or being influenced by others' plans, and how to reconcile the plans prior to final approval). These significant gains will justify the time and effort involved in changing the present manners in which MCPS plans to a more systematic process.

End Products:

1. A priority listing of 4-7 needs with objectives for meeting the needs.
2. Documentation to justify each need based upon "hard data" and staff, student, and community opinion.
3. A "matrix" displaying the interrelationship of priorities among units and levels.
4. Action plans providing budgetary information, describing how the needs will be met, and summarizing why other approaches were not preferred.
5. A relationship between requested resources to meet priorities and approved budgetary resources.
6. Implementation schedules with periodic status reports (reports to be done on an exception basis).

Challenge:

To provide professional leadership for the Board of Education and the MCPS community through more systematic planning.

EA 011 959

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Montgomery County Public Schools

MCPS COMPREHENSIVE PLANNING PROCESS

STAGES AND STEPS

Stage I - EXAMINE APPROVED PURPOSES/PRESENT PROGRAM

1. Examine Approved Purposes
2. Examine Present Program

Stage II - IDENTIFY NOTEWORTHY PROGRAMS/ACTIVITIES TO ELIMINATE/NEEDS TO ASSESS

3. Identify Noteworthy Programs
4. Identify Activities Eligible for Reduction or Elimination
5. Identify Initial Set of Needs to Assess
6. Confirm Programs, Activities, and Needs with Supervisor

Stage III - ASSESS/PRIORITIZE NEEDS AND ESTABLISH OBJECTIVES

7. Conduct the Needs Assessment
8. Prioritize Needs and Select Needs to Pursue
9. Establish Tentative Objectives with Standards
10. Review the Priorities, Needs, and Objectives with Supervisor
11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels

Stage IV - DEVELOP ACTION PLANS/BUDGET REQUESTS

12. Develop Several Possible Plans for Each Current Need
13. Select Preferred Plans
14. Integrate Previous Year's Needs with Current Needs
15. Examine and Revise Previous Plans Based Upon Approved Resources
16. Separate Plans Into Years of Implementation and Budget
17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor
18. Reconcile and Approve Plans and FY 81 Budget Requests at All Levels

Stage V - IMPLEMENT PLANS

19. Implement Plans

Stage VI - EVALUATE/RECYCLE

20. Reevaluate Plans and Evaluate Results
21. Recycle

SUMMARY/ANALYSIS

MCPS Comprehensive Planning Process

This summary reflects the following contacts and involvement in the developmental stages of the MCPS Comprehensive Planning Process:

(a) Initial contact with Dr. Stern and Dr. Steller to discuss possibility of involvement as consultant...(March 7, 1979)

(b) Reviewing materials describing the MCPS Comprehensive Planning Process .....(March 7-15, 1979)

(c) Meeting with Dr. Stern and Dr. Steller to discuss observations regarding materials.....(March 16, 1979)

(d) Participating in MCPS Comprehensive Planning Process Conference .....(March 23, 1979)

(e) Reviewing revisions in planning materials .....(April 17-19, 1979)

General Observation

Over a period of approximately ten years, I have observed and directly participated in comprehensive planning processes, conducted by school systems of varying size, throughout the country. I have no hesitancy in stating that of all programs with which I have had contact or involvement, the MCPS Comprehensive Planning Process is the best designed, most thoughtful, and is being most carefully introducted and implemented. It is a very sound program.

Specific Observations

1. Development/Refinement of the Planning Process

The structure of the process goes beyond mere adherence to conventional standards of sound comprehensive planning. The process:

(a) Is very detailed and explicit in its explanations of its major stages and steps.

(b) Reflects revisions and refinements in substance and format that have resulted from suggestions made by reviewers.

(c) Indicates responsiveness to reactions and suggestions of of those who will be involved in its implementation.

(d) Provides clear directions for carrying out the process and coordinating the various steps among the organizational units of MCPS. This is a most significant thrust because it is central to the success of the program.

The most recent revisions of the CPP working reports (A Conceptual Overview, Just What is a Need, Anyway, 1979-80 Guidebook, and School Information Survey) are much improved over earlier drafts. Excess verbiage has been decreased, schematic presentations are sharper, and instructions are more concise and understandable.

2. Responsiveness to Recommendations of Participants From March 23 Conference

It was a wise decision to let FY 80 be a pilot year. The need for this change seemed to me to come through clearly in the groups I audited in the March 23 conference.

The fact that some units have already volunteered to participate in FY 80 activities and more may do so will provide valuable "shake down" experience for FY 81 and make full implementation of the process more successful. (Many school districts that have embarked upon comprehensive planning prematurely have very often lived to regret it because it endangered the ultimate success of the program.)

The changes made in the drafts of the planning reports, referred to above, confirm suggestions made in the March 23 conference. This is especially true with regard to Just What is a Need, Anyway, 1979-80 Guidebook, and School Information Summary.

At the March 23 Conference, my impression was that the participants were quite receptive toward the MCPS Comprehensive Planning Process, in general terms. The fact that their suggestions were considered and, for the most part, heeded builds credibility in the staff of the Office of Program Development.

3. Planning Process Itself

I have already stated my overall opinion about the design of CPP. The twenty-one steps, comprising the six stages, are intrinsically sound and logical.

Initially, the presentation of the process seemed somewhat overwhelming in scope and detail. As I became more conversant with the rationale behind each step and as revisions were made in the procedures, I became convinced of the appropriateness of each of the planning documents.

The key to successful implementation of the process itself will be the equipping of the personnel in the various organizational units to understand the total process and the ways it will affect interrelationships among levels and united in the school system. The steps which the Office of Program Development have taken and plan to take (as outlined in the Summary of Key Events in Implementation Schedule) are designed to attain good orientation and understanding.

Three types of orientation (districtwide, unit, and individual) are provided for. Each is important. During FY 80, for those units that will be piloting the program, it will be important for the Coordinator For Systemwide Planning to conduct as many on-site visitations, as time may permit, to get first-hand reactions about how things are going, to identify problems that may be encountered, and to provide direct and timely assistance.

Written instructions are necessary and useful, but direct on-site "trouble-shooting" is important. There are other reasons for such indivial monitoring, but a very practical one is to fulfill a sage observation made, many years ago by a personnel executive of a large corporation who observed, in a meeting of school personnel administrators, that "people do what is inspected rather than what's expected." This admonition, used in a constructive context, has application in the implementation of the CPP.

4. Other Recommendations/Observations

The development of audio-visual materials which will augment written guidelines should be seriously considered and, if feasible, should be developed. Planners in the various units will be enabled, by the availability of such materials, to do a better job acquainting their people and patrons with the CPP.

As earlier stated, the determination to use 1980 as a pilot period was a prudent decision. The reorganization of MCPS, the shifts of key personnel, and other changes need a period of "settling-in" and 1979-80 will be that time. To have super-imposed the comprehensive planning process upon these important changes would have imposed undue risks upon its successful operation.

While it may seem that a year's delay in comprehensive planning is a year lost, this is not the case. Planning will be going on in FY 80 in a pilot manner. In addition, things will be learned that will make FY 81 a much more successful one.

While the Coordinator of Systemwide Planning will be the key person to do on-site monitoring and auditing of the CPP, consideration may well be given, in FY 81, to use an "external auditor" to make on-site visitations. The reason is that sometimes an external auditor can obtain more forthcoming information and form impressions that will be more objective than can be made by an internal auditor.

In conclusion, I merely wish to re-iterate what I stated, at the outset, that the CPP is a promising program for a school system that has long had a reputation for designing and instituting exemplary educational management programs.

Prepared by:

George B. Redfern
Consultant
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Proposed Integration of the Board's Priority Setting With the Comprehensive Planning Process

The setting of Board priorities is recognized as a complex and demanding task involving a great deal of input. Within the Comprehensive Planning Process, the Board of Education would receive [illegible] mid-summer a list of prioritized needs with supporting data generated by the organizational units in the pilot. The Board will be able to utilize this information in establishing and approving priorities for the next fiscal year (FY 81).

It would be most valuable to staff, if the Board would propose some "tentative needs" before [illegible] and other staff conduct their needs assessments. The Board's "tentative needs" would give some guidance to the staff as they decide what needs to assess. A less active form of Board involvement would be to wait and simply use the staff's priorities as input when setting the Board's priorities.

The steps outlined below are offered as a recommendation for integrating the setting of Board priorities with the Comprehensive Planning Process. The Board is encouraged to make full use of the procedures and our planning staff as may be required.

Suggested Procedures for Board of Education Involvement in The Planning Process

I. Orientation to the Comprehensive Planning Process - May 30

II. Development of "Tentative Needs" for FY 81 by Board - May 30-June 15

A. Board members will be provided with packets containing prior Priorities of the Board of Education and the superintendent, the Report of the Board of Education (December 1976-November 1978), recent policy issues discussed by the Board, and other information they may request.

B. Using the above information, each Board member should select unresolved items, that are considered important, as "tentative needs." To this list each Board member should add other items to be considered as "tentative needs" by the Board. These lists should be received in the Board's office by June 8.

C. The Board's staff will compile the eight lists of "tentative needs" into a combined list for the Board's consideration. This list then will be sent to each Board member.

D. Using the list of "tentative needs," each Board member will rate each item on a scale from one (high consideration) to five (low consideration) and return to the Board's staff by June 15.

E. The individual ratings will be tallied and averaged to derive those "tentative needs" receiving most support for highest consideration. A simple chart, such as the one below, will be used to record and communicate the results.

	1	2	3	4	5	Total	Average
Item							

F. (Optional) The derived "tentative needs" will be available to the Board for discussion and possible modification before distribution to planners.

NOTE: Being aware of some of the "tentative needs" as developed by the Board will be most helpful to the school principals and other planners as they identify and assess needs.

*III. Distribution of the Board's "Tentative Needs" to Planners - June 18

*IV. Completion of "Needs to Assess" by Planners - June 18

*V. Completion of Assessment and Prioritization by Planners - August 3

VI. Update on Comprehensive Planning Process Pilot - Mid-July

*VII. Reconciliation of Staff Priorities by Administrative Team - August 10

VIII. Setting of Priorities by Board of Education - August 21

The procedures outlined in II Step C, D, and E will be repeated and then the rank-ordered priorities will be available for discussion and possible modification by the Board before adoption as the priorities of the Board of Education.

NOTE: The Board's priorities will provide guidance for the staff as they develop action plans and budget requests for FY 81. The approved priorities will asist the Board throughout the budget development process, in establishing its calendar, in forming its agenda, and in other matters related to setting MCPS's compass.

*IX. Completion of Staff's FY 81 Action Plans and Budget Requests - November 1

*Steps not directly involving the Board.

COMPREHENSIVE PLANNING PROCESS

PILOT YEAR

THE BOTTOM LINE

A Planner has to....

a) Have a local planning team,
b) Read the 1979-80 Guidebook,
c) Use Steps 1-6 (and substeps and forms) as determined appropriate by the planner's unit,
*d) Complete Steps 7-10, including the use of the form "Indication of Need" for the 3-6 needs selected to pursue,
*e) Select preferred plans (Step 13) and complete appropriate "Action Plan" forms,
f) Review with supervisor (Steps 6, 10, and 17),
g) Implement plans in FY 81 and submit "Status Reports", and
h) Provide feedback to the Office of Program Development, as requested.

A Planner should....

a) Read all of the planning materials, and
b) Use and modify specific aspects of the entire planning process, as appropriate.

The Supervisor of a Planner has to....

a) Read the 1979-80 Guidebook,
b) Determine how to best complete Step 6, including how to use the "Needs to Assess" form,
c) Set deadlines for Steps 6, 10, and 17,
*d) Provide supervision and guidance for other planners,
e) Approve the planning units' products and procedures,
f) Complete "Consolidating Objective" forms for planning units (Step 11) within his/her unit,
g) Review with his/her supervisor (Steps 6, 10, and 17), and
h) Provide feedback to the Office of Program Development, as requested.

The Supervisor of a Planner should....

a) Read all of the planning materials,
b) Engage in the planning process for his/her own unit, and
c) Use and modify specific aspects of the entire planning process, as appropriate.

Reminder: This is a pilot year to improve upon the planning process. Please work through the process as best you can, let the Office of Program Development know what help you desire, and think of what improvements can be made for next year.

*Efforts should be focused upon these steps using the "Indication of Need" and "Action Plan" Forms as a guide.

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Montgomery County Public Schools

April 20, 1979

MCPS COMPREHENSIVE PLANNING PROCESS

A CONCEPTUAL OVERVIEW

Dr. I. L. Roy Stern, Associate Superintendent
for Program Development

Dr. Art Steller, Coordinator of Systemwide
Planning

The Montgomery County Public Schools Comprehensive Planning Process

Introduction and Rationale

In the Montgomery County Public Schools, educational planning has existed in some form and has met with varying degrees of success. Some past approaches have been incomplete or fragmented, and have failed to provide a comprehensive structure for systemwide decision making. While the beginning stages of any project require an additional investment of time and effort, this planning process is designed ultimately to streamline and complement present operations. Besides generally improved planning, the results anticipated initially include (a) a reduction in the number of MCPS priorities* and (b) an improvement in the integration of planning among organizational levels and units (by clarifying how units plan, the means for influencing or being influenced by others' plans, and how to reconcile the plans prior to final approval). These significant gains will justify the time and effort involved in changing the present manner in which MCPS plans to a more systematic process. Further, this planning process will provide a basis for the allocation of available human and material resources according to systemwide priorities.

The diverse and rapidly changing issues faced by the educational community necessitate improved methods of planning. The general public seems to be opposed to increased funding for schools without proportionate gains in results. In contrast to the past, the Montgomery County Public Schools is currently faced with a continuous decline in student enrollment, a decreasing share of county funds for education, mandated increases in some special services due to federal and state requirements, and an increase in inflation which lowers the purchasing power of the budgeted dollar. The net result of these factors is greater school system expenditure levels for a smaller number of students with some segments of the public questioning the efficiency of the educational system and its ability to manage its resources.

This planning process will expand the opportunities for teachers, parents, taxpayers, students, and other segments of the educational community to participate in the decision-making process, particularly at the school level. While input is frequently sought from such groups at present, this planning effort will describe and clarify the ways such input will be used in decision making. Consequently, people will continue to have the benefits of meaningful involvement but will also be able to see the ways in which such input can influence the decisions and priorities of the school system.

The overriding purpose during the first year is for the MCPS Comprehensive Planning Process to improve educational opportunities for students through increasing management effectiveness and efficiency focusing upon planning for FY 81. The Comprehensive Planning Process will gradually result in the formulation of short- and long-range plans for the school system. MCPS organizational units will utilize a common planning approach, resulting in an identification of needs, priorities, and objectives. MCPS curriculum development will be an outgrowth and user of the planning process. Resources will be funneled toward meeting the system's targeted needs. This "planning by exception" approach will focus upon approved priorities among needs verified at the school level. Used in this way, the planning process will contribute to improved student progress by closing gaps between current and desired conditions.

*Each unit is seen as having 4-7 priorities, including those countywide priorities which impact the local unit. (If one considers only those priorities of the Board of Education, superintendent, deputy superintendent, and the associate superintendents, there are presently 150-200 MCPS "priorities," most of which impact upon each unit.

The Montgomery County Board of Education and the superintendent of schools have recognized the need for a continuous, comprehensive, and cooperative planning process for MCPS to assure that the needs of all students are met (Resolution No. 744-75, October 27, 1975). The present Board of Education appreciates the need for comprehensive planning. A Board-sponsored resolution was passed in January, 1979, requiring the creation of a comprehensive countywide planning process and plan. Additionally, the benefits of comprehensive educational planning can be realized in the immediate future, as well as on a long-range basis, and can have an impact on every level in the school system. The overriding benefit is that we can do better through planning than without it; we can work more effectively and efficiently with greater satisfactions; and, above all, we can provide improved programs and services to MCPS students.

Assumptions

The following assumptions served as the basis for development of the MCPS Comprehensive Planning Process:

1. Broad-based involvement of an institution's members and clients is desirable in order to maximize both the validity and likelihood of successful implementation of decisions.

2. Cooperative involvement and decision making within the planning process enhances communication and espirit de corps within an institution and is at the same time dependent upon that communication and espirit de corps.

3. It is possible to establish broad-based input and cooperative decision making and at the same time satisfy the long-range demands upon the system for improved clarity, productivity, efficiency, and effectiveness.

4. It is possible for all institutional members and stakeholders to have the opportunity to take part, at least indirectly, in planning and for there to be many "planners"* assessing needs, setting priorities, formulating objectives, and developing plans.

5. All "planners"* will know the needs of their organizational units and will thus be able to take part in the planning process for determining priorities among needs either for the system as a whole or major segments of it.

6. MCPS can best achieve its mission by planning for all aspects of the whole system and the interrelatedness of the parts, rather than by each individual section developing unique plans.

7. While it is not possible to identify all the needs of a system, comprehensive planning increases the likelihood that the most important needs will be diagnosed and will receive high priority.

8. The terms and procedures related to stating and verifying needs and determining priorities among them can be agreed upon systemwide, understood, and made a part of everyday thinking and practice within the school system.

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*The term "planner" is used to indicate the head administrator (or designee) of each organizational unit who is engaged in planning.

9. Efforts to achieve the required systemwide understandings and practices will be consistently pursued by all involved parties over a long enough period of time if the comprehensive planning process is appropriately developed, adequately supported, and properly presented to MCPS to produce the behavioral changes within individuals and the system itself to reach the anticipated benefits.

10. Comprehensive, broad-based planning can be achieved without an increase, over the long run, of the workload of most people in the system but will require a redirection or reallocation of people's efforts.

Benefits of Planning

To Individual Planner or Planning Unit

- Provides for input and influence on decision making
- Allows resolution of differences via negotiations
- Provides basis for budget requests to support unit's priorities
- Involves many people in the decision-making process, thus taking into consideration various perceptions of how the unit is functioning
- Provides input into other unit's priorities and methods of delivery
- Provides for effective two-way communication in situations in which an individual or unit is impacted by others or in which others are affected by the individual or unit
- Supports the allocation and use of human and material resources
- Focuses on a limited number of priorities rather than the universe of needs
- Allows individual or unit to concentrate resources to solve pressing local problem(s)
- Clarifies direction and focus of individual or unit
- Provides easy mechanism for monitoring and controlling programs
- Provides justifiable bases for modifications and revisions
- Reduces the probabilities of having to react to crises. Individuals or unit may be able to do anticipatory planning based on their own past experiences and those of others.
- Allows for the diminution or elimination of the lowest priority objective(s) if a crisis situation occurs (e.g., new state mandate, new BOE priority, radical change in local situation)
- Provides for knowledge of and involvement in total school system efforts

- Provides support for change prior to the implementation of the change
- Encourages the elimination or reduction of effort in areas which are marginally productive

To School System as an Entity -- Many of the above benefits plus the following:

- Provides a means for improving the quality of education
- Allows appropriate decision making to occur at each level of the system
- Provides ongoing, self-renewing process for total school system
- Provides a means to increase unity and coordination of the total education program
- Provides consistency in planning process
- Provides the system with a mechanism for involving diverse constituencies in setting priorities and allotting resources
- Provides a smooth transition into the budget process
- Provides ready reference to status of implementation throughout the year
- Highlights for the public their contribution to the targeted objectives and standards prior to implementation
- Provides knowledge of the process of evaluation prior to implementation rather than after the fact
- Provides the superintendent and Board of Education information upon which they can make timely decisions about programs or processes
- Provides information on how well the school system is performing its job as perceived by many different groups not just the vocal and well organized
- Should provide stronger and better organized support for the public schools

Brief Description of MCPS Comprehensive Planning Process

Figure 1 portrays the major stages of the MCPS Comprehensive Planning Process. A flow chart, located in another section of this paper, outlines the steps involved in the process. The Planning Guidebook and other planning papers describe the process in detail and provide sequenced substeps and directions for effective implementation.

School principals; other chief administrators of divisions, departments, or offices; and the Board of Education are being requested to follow the comprehensive planning process in developing their FY 81 plans and budget requests. These plans and budget requests should include a distinction between maintenance of ongoing emphases and new thrusts.

Montgomery County Public Schools

MCPS COMPREHENSIVE PLANNING PROCESS

MAJOR STAGES

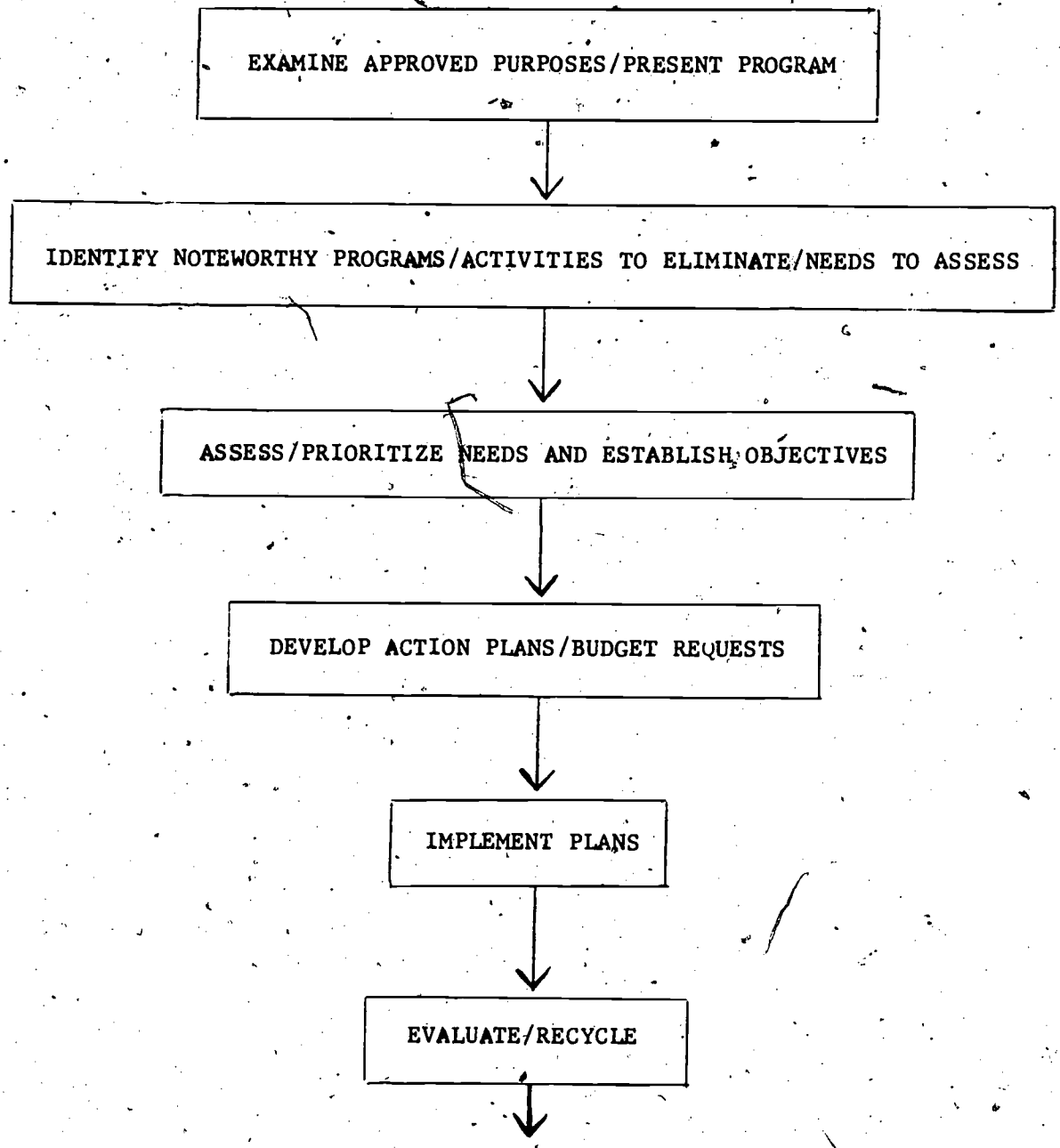


Figure 1

A set of steps are involved starting with the examination of approved purposes ("what should be") and present programs ("what is"). Needs (gaps between "what should be" and "what is") are then assessed, priorities are set, plans are created and budgets are established. Not all of the steps are required. The most crucial stage of the process is that of assessing and prioritizing needs and establishing objectives. The establishment of priorities should not necessarily be interpreted as ordering needs according to "the greatest good for the greatest number" (i.e., a need for minority or handicapped students may have a higher priority than a need relative to a larger portion of the student body). Within this segment the system takes coordinated aim at its future. The implementation and evaluation/recycling stages are applications and tests of the approved plans.

There are three times in the process when progress is reviewed by and approval to proceed obtained from one's supervisor (this does not pertain to the Board of Education). Likewise, on two occasions, within a coordinated and concentrated time period, all of the supervisor-approved work will be reconciled and approved throughout the system. These latter two steps establish the interrelatedness of organizational levels and how, for example, a school's priorities influence the Board's priorities and vice versa.

Goals of the MCPS Comprehensive Planning Process

- To provide a rational process for decision making, particularly with respect to the allocation of resources
- To clarify and streamline the interdependence of various countywide operations and information systems related to planning
- To establish a means for adjusting approved priorities and plans, if conditions change
- To meet as many of the identified needs, as possible, within existing constraints
- To identify, assess, and prioritize educational needs as discrepancies between current and expected results for each organizational unit which includes each of the schools and MCPS as a system
- To develop and implement a framework of interrelated goals and objectives based upon the prioritized needs of MCPS
- To generate alternative management plans, select cost-effective preferred plans and reconcile the plans throughout MCPS to form the basis for the preparation of the budget
- To create implementation and evaluation procedures for the approved management plans
- To formulate procedures for reviewing and recycling the management plans in light of the achievement of the stated objectives

Organization for Planning

The planning process provides a structure within which decisions are made, communication linkages are utilized, people are organized, and time lines are established. Many organizations continually create new structures to meet pressing demands. The position taken in the MCPS planning process is that existing structures in this system are sufficient, possibly with only slight modifications, to contribute to a comprehensive planning process.

The simplified organizational chart (see Figure 2) represents the MCPS units to be involved in the planning process. The major organizational units for this purpose are (a) divisions, departments, and the offices of associate superintendents and organizational units reporting directly to the superintendent at the central office level; (b) schools and the area offices for the school-based level; and (c) the office of the superintendent at a systemwide level. The deputy superintendent's office will be considered as part of the superintendent's office. The Board of Education constitutes a planning unit whose function is somewhat different from the above units. (See explanation which follows.)

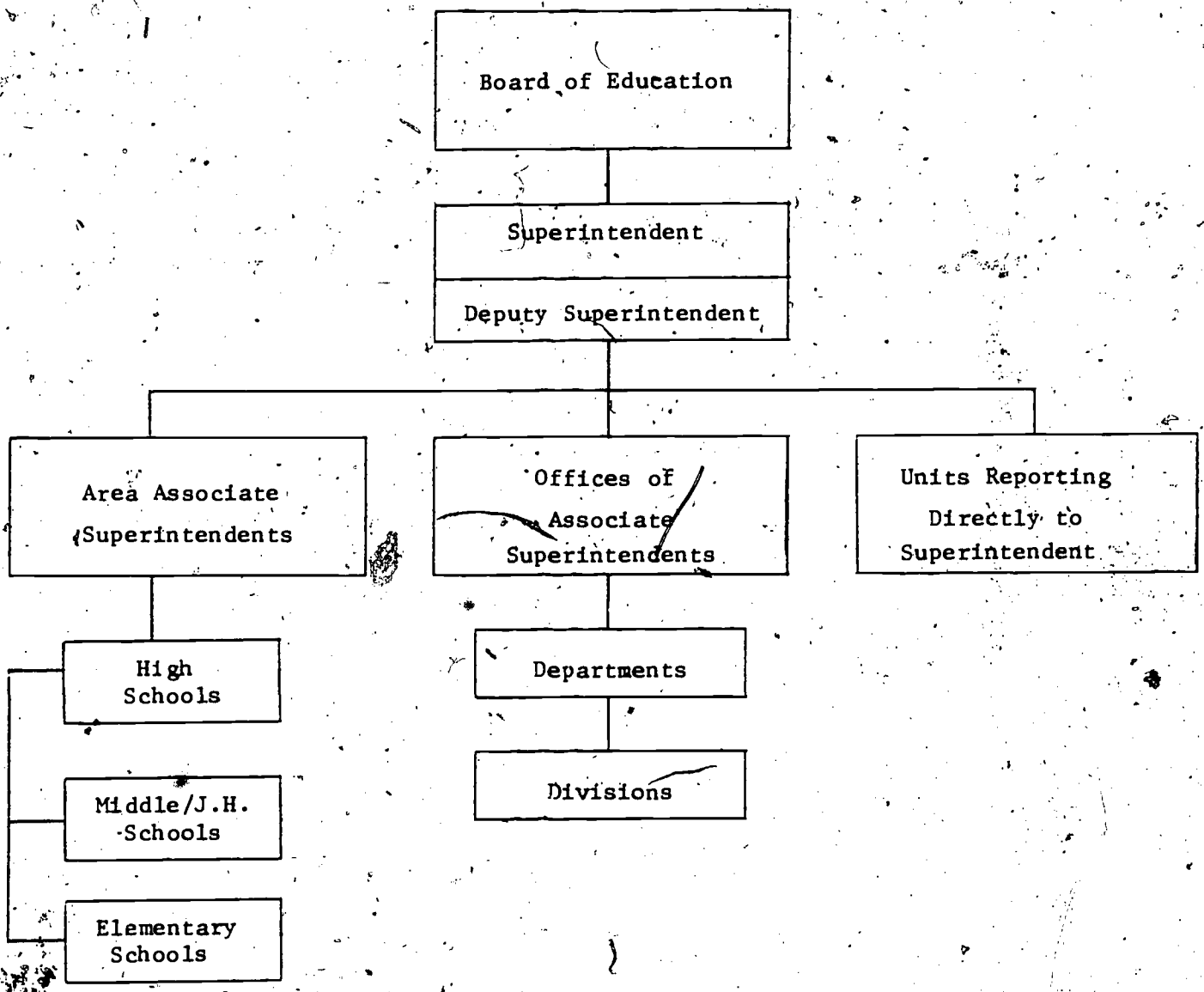
Planner

The term "planner" is used to indicate the head administrator of each organizational unit who is engaged in the planning process. There are additional persons whose position titles include the word "planner" for whom planning is virtually a full-time responsibility. Consequently, MCPS, as the process becomes implemented, will have large numbers of educational planners contributing to local and systemwide plans.

Local Planning Team

It is suggested that the administrator in charge of each organizational unit utilize an existing coordinating group, such as a steering committee or coordinating council, as a local planning team. Besides the planner, a local planning team would include representatives from its own members, units it supervises or coordinates, other units with whom it interacts, and, perhaps, the community. For example, a school planning team could consist of the principal, some classroom teachers, other staff, parents, other citizens, and, perhaps, students. Central office units who service other MCPS units should consider including such "clients" on their planning teams or obtaining feedback through a liaison system.

New groups need not be formed, unless no other body exists to fulfill this role. The label "local planning unit" is referred to occasionally throughout the description of the planning process; however, it is not intended that steering committees, liaison groups, etc., rename themselves "local planning teams." The two overriding responsibilities of the local planning team are to coordinate the planning process and serve as communication bonds with other local planning teams. The composition of such a local planning team would have less than five members, if possible, since it is a working body.



SIMPLIFIED ORGANIZATIONAL CHART FOR PLANNING PURPOSES

Figure 2

Systemwide Reconciling/Planning Team

The superintendent's Administrative Team will serve as the systemwide planning team. Other MCPS staff members may be asked to join the Administrative Team from time to time in relation to specific aspects of some plans or at key junctures of the process itself. The administrative team functions as a vehicle for synthesizing the ideas both of MCPS leadership and of the members of their respective units. The planning roles of this group are to recommend administrative decisions, provide guidance for system governance, foster communication, relate the interactions of the various plans, and create and recommend systemwide plans. A unified and collaborative direction and collective effort will result from the work of the systemwide planning team.

The comprehensive planning process calls for the superintendent's Administrative Team to coordinate two specific steps, namely, reconciling and recommending the system priorities, needs, and objectives at all levels and reconciling the action plans of all organizational units.

Planning Coordinator

A prime responsibility of the Office of Program Development is the coordination of the comprehensive planning process. The main emphasis of the school system, hence planning, is to further the instructional process which is why centralization of planning has been established in this office. As previously cited, numerous individuals and activities concerned with planning must be coordinated. The coordinator of systemwide planning, in cooperation with other personnel in the system, facilitates the coordination of the entire planning process. Responsibilities of the coordinator include developing the comprehensive planning process, initiating and coordinating implementation of the process, working with the budget department to design the interrelationship of the planning process and the budget, working with other MCPS departments as appropriate to clarify and assist participants in planning effectively, maintaining communication with all levels of MCPS and the community and local and state government offices as it relates to the planning process, and generally evaluating and revising the planning process.

Ad Hoc Committees, Advisory Committees, Study Groups, and Task Forces

Specific aspects of planning may be assigned by a planner to ad hoc committees, advisory committees, study groups, or task forces. These groups may be charged with identifying, assessing, or prioritizing needs. They may generate plans (see planning paper on Task Force Reports) or they may react to an intermediate product of the planning process. Their reports and commentary provide valuable input for planning.

Special Interest Groups or Other External Groups

The public is composed of many special interest groups or other external groups that are not directly connected to MCPS. Because of their informal or tangential relationship to MCPS, they have no formal responsibility in the planning process. Nevertheless, all organizations and individuals making up the community have a stake in the school system. Because of this, their input should be deliberately solicited throughout the process, but particularly when identifying and assessing needs. It should be recognized that such special interest groups are often a primary force for change, i.e., handicapped student advocates.

Board of Education

The Board of Education has the legally constituted right to act in trusteeship of the school system. As such, the Board plays a critical role in the comprehensive planning process. Successful implementation will require the Board to participate actively in the planning process. The Board may wish to identify areas for study or assessment. It is the Board that will ultimately approve the priorities, needs, and objectives for the system as a whole. The Board will be kept informed of plans as they are developed in relation to the system's priorities so that they can make informed budgetary decisions regarding implementation. The Board will make policy decisions on the basis of outcomes of planning. The Board may also assist in communicating with the community at large.

Comprehensive Planning Integrates Systemwide Activities

The MCPS Comprehensive Planning Process is an umbrella term which implies a dependence upon and relationship with other systemwide activities. One of the charges and a real challenge is for the design to clarify the interdependence of various systemwide operations related to planning. Several planning papers, either in part or whole, will specify this integration.

Some MCPS activities generate valuable data useful for planners. The "Annual Testing Report," the "Digest of Educational Statistics," "Annual Surveys," "Annual School Reports," the management information system, "Annual Enrollment Projections," etc., are informational goldmines with respect to planning.

The preparation of the operating and the capital budget requests is counted among the major elements of planning. Curriculum development will operate within the framework of the planning process. Task force reports, in-service strategies, grant proposals, planning for facilities utilization, etc., are planning functions coordinated within the overall process. The establishment of objectives* by each level of the system and each individual also is included within the context of educational planning. The Comprehensive Planning Process is not meant to supersede existing procedures for such systemwide activities, but it does draw a relationship among them and facilitates capitalizing upon their interdependence.

Implications for the Local Unit

Comprehensive planning for and within a school system the size of MCPS is a complex procedure; however, the mechanics of planning should be carefully designed to make the work relatively painless and straightforward for the local unit. Forms, deadlines, negotiations with one's boss, and other such things enable one to formulate plans and move them through the organization.

A Planning Guidebook has been prepared as an easy-to-follow aid for working through the MCPS Comprehensive Planning Process. By itself, it is just another procedure; however, it provides a planning framework to keep the process and the individual planner on track. Besides, some commonality is necessary so that all the pieces fit together without competing.

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*Presently in MCPS the term "priorities" is often used interchangeably with objectives.

The generally articulated organizational purposes and benefits of planning, while valid, sound abstract and removed from the local unit. The unspoken reasons people find for planning are mainly selfish: planning improves communication and relationships among people and planning enables one to receive or reallocate resources to get something done. A well-conceived plan is a rationale for one's actions.

The time and effort necessary to utilize successfully the Comprehensive Planning Process is subject to many factors and will consequently vary from unit to unit. This planning process will replace the setting of annual unit objectives and contribute substantially to the development of personal objectives and budget requests. The planning activities leading up to implementation are to be paced over a six-month period, although exchanges of information relative to planning go on continuously. The anticipated results justify the pursuit of an improved means of planning. Furthermore, it is anticipated that the Comprehensive Planning Process will lead to fewer priorities, thus conserving and concentrating energies.

Within the planning process, the needs, priorities, and plans of each local unit will be collected and contribute to the needs, priorities, and plans of MCPS. Grassroots planning will thus supplement topdown planning which will produce an overall improvement.

The end product for the local unit will be clarity regarding what is to be done, how it is to be done, and what resources are available for doing it. An important by-product will be the knowledge that the impact of someone else's plans upon the local unit will have been reconciled prior to approval. Also, the phenomena of the interjection of major new directions and priorities after the original plans have been completed will be minimized and/or taken into consideration with respect to expectations. The main beneficiaries of a more systematic process for planning will be students, as the planning focus will be directed towards meeting their needs.

Implementation of the Planning Process

The Comprehensive Planning Process has been designed as a means for assisting MCPS On Learning to Plan and Planning to Learn.* The planning process will take at least three years to become fully operational and two more years to reach desired refinement. It will take such time and effort to achieve all of the goals listed on page 6 and to witness the full impact of the benefits given on pages 3 and 4. Even at that point, the process should not be static but should continually adapt to new demands, pressrues, knowledge, and requirements.

The MCPS Comprehensive Planning Process is scheduled for systemwide implementation for FY 82. This spring/summer the process will be piloted by some MCPS organizational units, i.e., schools, area offices, departments, etc. Improvements in the process, forms, timetables, etc., will be made based upon suggestions by participants.

During the first full year of implementation, major aspects of the process should become institutionalized. Each school principal or other chief administrator of a division, department, or office and the Board of Education will be following the Comprehensive Planning Process in developing FY 82 plans and budget requests. Emphasis will be directed upon the grassroots development of a set of needs,

*Donald Michael, On Learning to Plan and Planning to Learn (San Francisco: Jossey-Bass, 1973)

priorities, and objectives with budget allocations being addressed to each school or department's unique needs. Additionally, the resulting plans can be projected ahead to lay the foundation for more long-range planning. A small group, after our first efforts, will be formed to make some preliminary attempts at developing forecasting techniques for the short-term view (up to five years) and a longer view (5-10 years) of MCPS's future.

During the second year of complete implementation, long-range planning (up to five years) will be the emphasis. The allocation of budgetary resources should be firmly committed towards accomplishing the priorities of the system and each part thereof.

Further refinements in the planning process will be made during the third year (1982) of implementation. All of the above elements should then be incorporated into the process. It will undoubtedly take two more years to have the specific pieces of the planning process to the point of being a totally integrated, interactive process.

Summary of the System Used for the Development of the Comprehensive Planning Process

Information Aspects:

MCPS Past and Present Documents and Procedures Related to Planning
A Variety of Planning Models, Processes, Procedures, and Products Used by School Systems and Other Institutions Across the Country
Literature Concerning Planning for Education, Other Social Agencies, Cities, Corporations, etc.
Various Organizations or Associations for Planners
Academic Course Outlines and Other Training Courses for Planners

A resource file consiting of the above items and other information is being set up for utilization by MCPS planners.

Involvement:

Board of Education in 1975 - resolution
Administrative Reorganization
Present Board of Education - resolution

Associate Superintendent for Program Development - Dr. Stern
Coordinator for Systemwide Planning - Dr. Steller
Preplanning Task Force - Dr. McKay, Mrs. Morgan, Dr. Howard, and Dr. Usdansky

Liaisons for the Comprehensive Planning Process:
- Area Associate Superintendents - Dr. Paul Vance
- Area Directors of Instruction - Mr. Ed Hoffmaster
- Area Directors of Continuum Education - Mrs. Patricia Newby
- Department of Educational Accountability - Dr. Steve Frankel
- Department of Human Relations - Ms. Wilma Fairley
- Montgomery County Association of Secondary School Principals - Dr. Pat Emma and Mr. Otis White
- Montgomery County Education Association - Mrs. Toni Parker
- Montgomery County Elementary Principals Association - Mr. George Goldsmith
- Montgomery County Council of Parent Teacher Association - Mrs. Regina Greenspun and Mrs. Zoe Lefkowitz
- Montgomery County Council of Supporting Services Employees - Mrs. Zoe Lefkowitz
- Montgomery County Student Government Association - Mr. Phil Ehr
- Office of Continuum Education - Dr. Thomas O'Toole
- Office of Supportive Services - Mr. David Fischer

Various OPD Staff
Principals - several groups
Elementary Alternatives Task Force
IPD - Dr. Massaro, et al. (Curriculum Development Model based upon Planning Process)
Informal "consulting" by ASCD staff, planning consultants, and other institutional planners
Consultant - Dr. George Redfern
Some Area Office Staff
Both the Administrative and Implementation Teams

Suggestions and feedback have been obtained in writing, individual conferences, and group meetings over an eight-month period.

Additional contacts have been made with a variety of persons on an ad hoc basis, as considered appropriate. MCPS staff have also been encouraged to contribute ideas and materials on their own initiatives. Further feedback from the community has been spontaneous, i.e., Dick Silver who is active in MCCPTA has been most helpful.

The Comprehensive Planning Process was further refined during an all-day work session attended by 35 persons including two area associate superintendents, the executive assistant, one central office associate superintendent, ten principals, various other area and central office staff, and a representative from MCCPTA and MCCSSE.

Various presentations have been held at the Educational Resource Center, area offices, MCEA office, etc., to explain the process, answer questions, and obtain feedback.

Montgomery County Public Schools

MCPS COMPREHENSIVE PLANNING PROCESS

STAGES AND STEPS*

Stage I - EXAMINE APPROVED PURPOSES/PRESENT PROGRAM

1. Examine Approved Purposes
2. Examine Present Program

Stage II - IDENTIFY NOTEWORTHY PROGRAMS/ACTIVITIES TO ELIMINATE/NEEDS TO ASSESS

3. Identify Noteworthy Programs
4. Identify Activities Eligible for Reduction or Elimination
5. Identify Initial Set of Needs to Assess
6. Confirm Programs, Activities, and Needs with Supervisor

Stage III - ASSESS/PRIORITIZE NEEDS AND ESTABLISH OBJECTIVES

7. Conduct the Needs Assessment
8. Prioritize Needs and Select Needs to Pursue
9. Establish Tentative Objectives with Standards
10. Review the Priorities, Needs, and Objectives with Supervisor
11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels

Stage IV - DEVELOP ACTION PLANS/BUDGET REQUESTS

12. Develop Several Possible Plans for Each Current Need
13. Select Preferred Plans
14. Integrate Previous Year's Needs with Current Needs
15. Examine and Revise Previous Plans Based Upon Approved Resources
16. Separate Plans Into Years of Implementation and Budget
17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor
18. Reconcile and Approve Plans and FY 81 Budget Requests at All Levels

Stage V - IMPLEMENT PLANS

19. Implement Plans

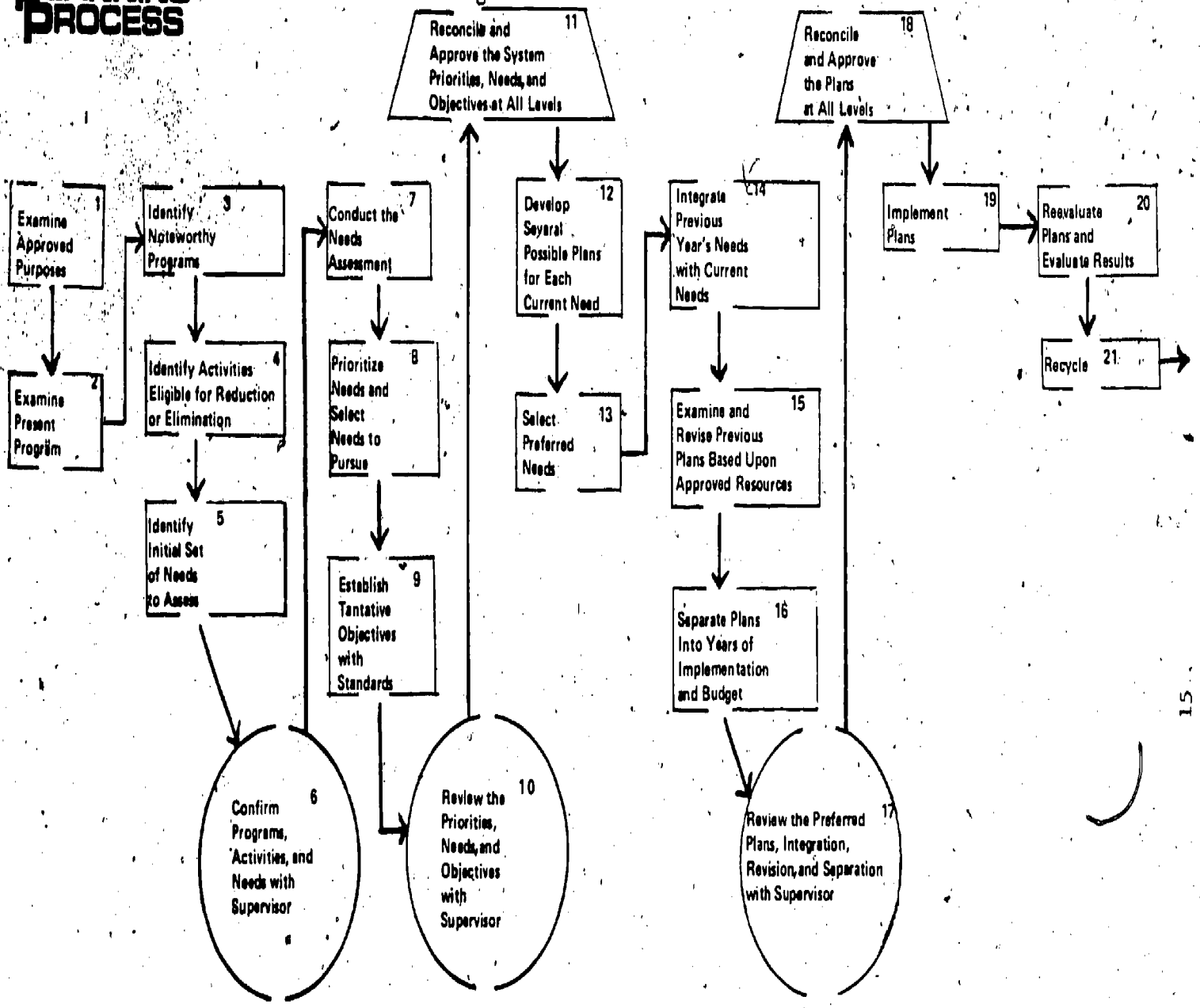
Stage VI - EVALUATE/RECYCLE

20. Reevaluate Plans and Evaluate Results
21. Recycle

*Steps 3, 4, 12, and 14-16 are optional for 1979-80.

MCPS COMPREHENSIVE PLANNING PROCESS

FLOWCHART



School principals, chief administrators of divisions, departments, or offices, and the Board of Education are being requested to follow the Comprehensive Planning Process in developing their FY 81 plans and budget requests.

The leader of each organizational unit is responsible for working with his/her staff and, perhaps, other stakeholders (parents, students, and community) throughout the process. There are three times in the process when progress is reviewed by and approval to proceed obtained from one's supervisor (does not pertain to the Board of Education). These points, which signify planning interactions which are more intensive and focused than those which go on continuously with the system, are indicated on the above model as a circle. Likewise, on two occasions, within a coordinated and concentrated time period, all of the supervisor-approved work will be reconciled and approved throughout the system. These latter two steps, indicated by trapezoids, establish the interrelatedness of organizational levels and how, for example, a school's priorities influence the Board's priorities and vice versa.

COMPREHENSIVE PLANNING PROCESS

SCHOOL INFORMATION SUMMARY

Elementary School

School Name...

Location.....

Principal.....
Telephone.....

School Number...
Area.....

This summary is provided for your use in the planning process. Wherever data or information for your school could be located centrally, it is contained in this report. The format and contents are subject to modification and revision based on staff reactions this year.

The topics and categories listed below are intended to serve as a framework for classifying data and information in a standarized fashion. The categories obviously are not exhaustive and you may supplement it with additional information (space is provided).

The attached report does not represent a set of indices from which all needs can be extracted. In fact, it should not be considered a needs assessment, although some of the data may be helpful for that purpose. Likewise, the completion of this report should not be considered a complete evaluation scheme. In some cases a space has been provided to set goals for next year relative to some data elements.

TOPIC I: Student-Community Characteristics

Categories:
- Enrollment and Attendance
- Test Data
- Handicapped and Other Special Needs
- Suspensions and School Damage
- School Community Relations
- Community Demographies

TOPIC II: Administration and Organization

Categories:
- Administrative Organization
- Food Services
- Safety
- Transportation
- Facilities
- Budget/Other Funds

TOPIC III: Personnel

Categories:
- Staffing
- Staff Development/In-Service

TOPIC IV: Program

Categories:
- Recent Systemwide Approaches
- Instructional Approach
  - Art
  - Career Education
  - Reading/Language Arts
  - Health Education
  - Mathematics
  - Multidisciplinary Programs
  - Early Childhood Education
  - Environmental Education
  - Music
  - Physical Education
  - Science
  - Social Studies
  - Handicapped and Other Special Needs
- Instructional Supports
- Extra-Curricular

TOPIC I: STUDENT-COMMUNITY CHARACTERISTICS

Category: Enrollment and Attendance

Grade	9/30/77 1977-78 N	%	3/30/79 1978-79 N	%
TOTAL.....		100.0		100.0
Special Education/ (Self-Contained)..				
Head Start.....				
Kindergarten.....				
Grade 1.....				
Grade 2.....				
Grade 3.....				
Grade 4.....				
Grade 5.....				
Grade 6.....				

Race	9/30/77 1977-78 N	%	3/30/79 1978-79 N	%
GRAND TOTAL.....		100.0		100.0
White.....				
TOTAL MINORITY.....				
American Indian.....				
Asian.....				
Black.....				
Hispanic.....				

Sex	9/30/77 1977-78 N	%	3/30/79 1978-79 N	%
Male.....				
Female.....				

Average Student Attendance.....
Students Transported.....
Student Mobility Rate.....

% Title I Students.....

Students out of District.....

Enrollment Trends

Grade	Recent History 1972	1973	1974	1975	1976	1977	1978	Projections 1979	1980	1981	1982
Head Start											
K											
1											
2											
3											
4											
5											
6											
Special Ed											
Total											

Other Data:

STUDENT-COMMUNITY CHARACTERISTICS

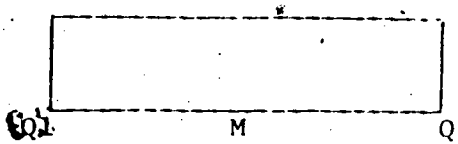
Category - Test Data

Grade 3 - 1977-78 School Year

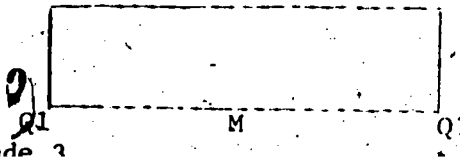
Scholastic Aptitude	School Average Standard Age Score (S.A.S.)	S.A.S. Expressed as National Percentile
Norm	100	50
Cognitive Abilities Test (CAT) Verbal Quantitative Nonverbal		
Achievement	School Average Grade Equivalent Score (G.E.)	G.E. Expressed as a National Percentile
Norm	3.7	50
Iowa Tests of Basic Skills (ITBS) Vocabulary Reading Comprehension		
Spelling Capitalization Punctuation Language Usage		
Map Reading Reading Graphs & Tables Knowledge & Use of Reference Materials		
Math Concepts Math Problem Solving		

Percentile Rank for the Student Scoring
First Quartile (QI), Median, and Third Quartile (Q3)

Grade 3 CAT Verbal



Grade 3 Composite



STUDENT-COMMUNITY CHARACTERISTICS

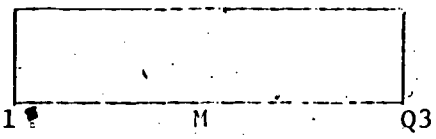
Category - Test Data

Grade 5 - 1977-78 School Year

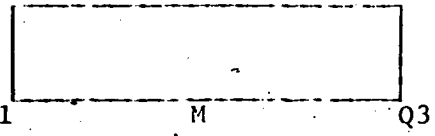
Scholastic Aptitude	School Average Standard Age Score (S.A.S.)	S.A.S. Expressed as National Percentile
Norm	100	50
Cognitive Abilities Test (CAT) Verbal Quantitative Nonverbal		
Achievement	**School Average Grade Equivalent Score (G.E.)**	**G.E. Expressed as a National Percentile**
Norm	5.7	50
Iowa Tests of Basic Skills (ITBS) Vocabulary Reading Comprehension		
Spelling Capitalization Punctuation Language Usage		
Map Reading Reading Graphs & Tables Knowledge & Use of Reference Materials		
Math Concepts Math Problem Solving		

Percentile Rank for the Student Scoring
First Quartile (QI), Median, and Third Quartile (Q3)

Grade 5 CAT Verbal



Grade 5 Composite



Category - Test Data

School Results for Longitudinal (L) and Non-Longitudinal (NL) Groups

Scores reported are the standard age group (SAS), grade equivalent (GE), and national percentile rank (PR), of the student with mean score.

Grade	Number Taking Composite		CAT VERBAL				ITBS Composite			
			L		NL		L		NL	
	L	NL	SAS	PR	SAS	PR	GE	PR	GE	PR

Maryland Early Identification Testing Results 1978-79

Grade	Number of Students Referred For Further Screening	Number of Students Referred to EMT (or SARD)
K		
1		
2		
3		

Child Find Report - March 15, 1979

Total Number of Suspected Handicapped Students Referred for Diagnosis To Date	Total Number of Students Diagnosed as Handicapped and Needing Special Education To Date	Total Number of Handicapped Students Being Served to Date

Stanford Achievement Test
Grade 2 - October 1978

Number of Students below fourth Stanine in Reading

3- Longitudinal, Early Identification, Child Find, and Grade 2 Reading

STUDENT-COMMUNITY CHARACTERISTICS

Category: Handicapped and Other Special Needs

Unduplicated Level Totals By Group - March 1979

Group	Number of Students	Group	Number of Students
Mentally Retarded		Gifted and Talented	
Speech Impaired		Disadvantaged	
Auditory Impaired		Emotionally Disrupted	
Visually Handicapped		Other Language Speaker	
Specific Learning Disability		Other (specify)	

Duplicated Level Totals By Program - March 1979

Program	Level 10	Level 20	Level 30	Level 40	Level 50	Total
Special Education						
Title I						
Head Start						
ESOL						
Auditory						
Speech and Language						
Vision						
Other (Specify)						

Recommended Service Not Being Provided - March 1979

Program	Level 10	Level 20	Level 30	Level 40	Level 50	Total
(Specify)						

STUDENT-COMMUNITY CHARACTERISTICS

Category: Suspension and School Damage

Student Suspensions

Year	Total Number	% of Minorities	Average Length Total	Average Length Minor
Past				
Current				
Next				

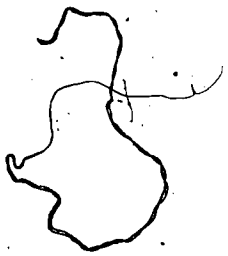
Property Loss

	7/1/77-6/30/78	7/1/78-12/31/79
Property Destruction		
Restoration of Glass Windows		
Theft		
Total		
Minus Restitution		
Net Cost		
Fire Loss		
Number of Unlawful Entries		

Other Data:

Category: School-Community Relations

Schools have a variety of sources upon which to draw for this category. However, except for the community survey, standardized data is not available. The community survey results may be utilized for this category but you will need to select appropriate information to consider. Either attach relevant information of summarize below:



Category: Community Demographics

Significant Changes in Housing Patterns

(Within the last year, i.e., new apartments planned, elimination of low cost housing, etc.)

Other Data:

TOPIC II: ADMINISTRATION AND ORGANIZATION

Category: Administrative Organization

Grade Organization: Number of Classes

Year	Head Start	K	1	1-2	2	2-3	3	3-4	4	4-5	5	5-6	6	(Specify)
Other Organizational Pattern														
Prior														
Current														
Next														

Item	1977-78	1978-79
Hours of School Day		
Marking Period	weeks	weeks
*Student/Professional Staff Ratio		
Average Class Size		
K		
1, 2, and 3		
4, 5, and 6		
Total School		
Receiving Schools		

Other Data:

*For Secondary Schools: A/B

A (numerator): Weight Regular Student Enrollment
- includes: all regular students (other than kindergarten)
  one-half of (half-day) kindergarten students
- does not include: Head Start students
  Special education students in self-contained classes

B (denominator): Sum of Full-Time Equivalent of -
- regular classroom teachers
  reading, disadvantaged teachers
  traveling teachers (art, music, phys. ed.)
  ESOL, bicultural teachers
  other professional and administrative
- does not include: Special education classroom teachers
  resource room teachers

Category: Food Services

	Prior Year*		Current Year*	
	N	%	N	%
Total		100		100
Purchasing Lunch				
Free Lunch				
Reduced Lunch				
Purchasing Milk Only				
Purchasing A La Carte Food Only				
Breakfast Program				

Other Data:

*Based on the average student participation in the food program for the same one-month period each year.

Category: Safety

Year	Student Accidents Reported	Staff Accidents Reported
Prior		
Current		

Other Data:

Category: Transportation

	Prior Year	Current Year	Next Year
% Walking			
% Bused			

Other Data:

Number of Buses.....
Number of Special Ed Students Bused.
Number of Special Ed Buses.....
Time of First Bus Arrival.....
Time of Last Bus Pickup.....

ADMINISTRATION AND ORGANIZATION

Category: Facilities

Site, Capacity, Room Use - This and Adjacent Schools

School	Site Acres	Capacity Range	Rooms	Actual Current Enrollment	Current Use of Rooms					
					Regular K	Regular 1-6	Spec. Ed	Spec. or Alt Prog.	Joint Occ.	Other Use

	Entire Building	Number of Rooms	Other Space
Air Conditioning			

Scheduled Modernization/Renovation

Year	Description	Estimated Cost

Year Scheduled for Possible Closing Study _____

Other Data:

Facility Utilization

	Prior Year	Current Year	Next Year
1. Number of instructional areas used for kindergarten			
2. Number of instructional areas used for regular classes, Grades 1-6			
3. Number of instructional areas used for special education			
4. Number of classrooms used for:*			
a. Music centers			
b. Art centers			
c. Science centers			
d. Mathematics centers			
e. Resource centers or teachers			
f. Head Start			
g. Joint occupancy (identify uses, e.g., day care#)			
_____			
_____			
_____			
h. Special and/or alternative programs (identify program, e.g., adult education#)			
_____			
_____			
_____			
i. Other			
Reading Lab			
_____			
_____			
5. Number of classrooms not in use			
TOTAL number of classrooms (Sum of Items 1-5)			

If any rooms other than those listed above are being used as classrooms, please list under Other Data.

*Do not count specialized facilities, e.g., IMC, gymnasium, or art and music room if especially designed and equipped for those functions.

#Uses must require that the classroom not be available for the school's regular program use during the school day.

6. Specialized Facilities (Especially designed and equipped for functions like IMC, gymnasium, art, and music - These should be rooms not counted above.)			
a. IMC			
b. Gymnasium			
c. Art			
d. Music			
e. Other			
_____			
_____			

ADMINISTRATION AND ORGANIZATION

Category: Budget/Other Funds

Standardized data is not presently available for this category, therefore, you have flexibility in deciding upon what to include and how. You may wish to make year-to-year comparisions between allocations, activity funds, and even PTA income and set corresponding objectives.

TOPIC III: PERSONNEL

Category: Staffing

STAFF ALLOCATIONS

Instructional Staff	1977-78 N	1977-78 FTE	1978-79 N	1978-79 FTE
GRAND TOTAL.....				
PROFESSIONAL STAFF TOTAL.....				
Regular Classroom Teachers.....				
Special Education Classroom Teachers.....				
Reading Teachers.....				
Disadvantaged Teachers.....				
Resource Room Teachers.....				
Traveling Teachers: Art, Music, Physical Education..				
English for Speakers of Other Languages, Bicultural Teachers.....				
Special Needs Teachers.....				
Other Professional/Administrative Staff.....				

Sex	1977-78 N	1977-78 %	1978-79 N	1978-79 %
Male.....				
Female.....				

Race	1977-78 N	1977-78 %	1978-79 N	1978-79 %
White.....				
Minority.....				

Staff Turnover Rate
Staff Requests for Transfer
Number Staff Absence (over 15 days)

Other Data:

PERSONNEL

	Prior Year	Current Year	Next Year
Secretarial Staff			
Building Service Staff			

	1977-78 N	1977-78 FTE	1978-79 N	1978-79 FTE
INSTRUCTIONAL AIDES TOTAL.....				
Regular Instructional Aides.....				
Special Education Aides.....				
Instructional Materials Center Aides.....				

Utilization of Aides

For each aide allocated to your school, briefly describe the manner in which they are utilized. Provide approximate percentages of time typically assigned to each task.

Aide	Utilization

Utilization of Volunteers

Number _____

PERSONNEL

Category: Staff Development/In-Service

NOTE: 1977-78 - No data available for traveling teachers
1978-79 - Number of Vacant Positions

PROFESSIONAL STAFF DATA

Highest Degree Status	1977-78 N	1977-78 %	1978-79 N	1978-79 %
TOTAL.....				
Non-Degree.....				
Bachelor's.....				
Master's.....				
Master's + 30.....				
Doctoral.....				

Years of Experience	1977-78 N	1977-78 %	1978-79 N	1978-79 %
TOTAL.....				
4 or less.....				
5-14.....				
15-24.....				
25-34.....				
35 or more.....				
define at years in MCPS or total				

Brief Description of Current Emphasis on In-Service in School

Planned Emphasis next year

Other Data:

PROGRAM

Category: Recent Systemwide Approaches

Instructional Systems	Pilot Year	Implementation Year
Math		
Reading/Language Arts		
Science		
Social Studies		
Early Entrance - First Grade		
Interrelated Arts		
Prototype Teacher Planning		
STEP		
Other:		

INSERT COURSE OFFERINGS BULLETIN

TOPIC IV: PROGRAM

Category: Instructional Approach

Describe the general instructional approach for each of the basic programs. Indicate if different strategies are used at different grade levels or courses.

Art –

Career Education –

Reading/Language Arts –

Health Education –

Mathematics –

Multidisciplinary Programs –

Early Childhood Education –

Environmental Education –

PROGRAM

Music –

Physical Education –

Science –

Social Studies –

Handicapped and Other Special Needs –

Other Data:

PROGRAM

Category: Instructional Supports

List Numbers of Items in School Instructional Equipment:

_____	Movie Projectors	_____	Record Players
_____	Slide Projectors	_____	TV Monitors
_____	Overhead Projectors	_____	TV Tape Recorders
_____	Reel-to-Reel Tape Recorders	_____	_____
_____	Cassette Tape Recorders	_____	_____

List textbooks for the basic programs.
Indicate if different textbooks are used at different grade levels.

Reading/Language Arts - _____

_____

_____

Math - _____

_____

_____

Social Studies - _____

_____

_____

Science - _____

_____

_____

Other Data:

PROGRAM

Category: Extra-Curricular

Standardized data is not presently available for this category, therefore, you have flexibility in what data sources you use. You might consider extra-curricular stipends, number of students participating, etc.

MCPS COMPREHENSIVE PLANNING PROCESS

SCHOOL INFORMATION SUMMARY

Middle/Junior High School

School Name...

Location.....

Principal.....
Telephone.....

School Number...
Area.....

This summary is provided for your use in the planning process. Wherever data or information for your school could be located centrally, it is contained in this report. The format and contents are subject to modification and revision based on staff reactions this year.

The topics and categories listed below are intended to serve as a framework for classifying data and information in a standarized fashion. The categories obviously are not exhaustive and you may supplement it with additional information (space is provided).

The attached report does not represent a set of indices from which all needs can be extracted. In fact, it should not be considered a needs assessment, although some of the data may be helpful for that purpose. Likewise, the completion of this report should not be considered a complete evaluation scheme. In some cases a space has been provided to set goals for next year relative to some data elements.

TOPIC I: Student-Community Characteristics

Categories:
- Enrollment and Attendance
- Test Data
- Handicapped and Other Special Needs
- Student Behavior/School Climate
- School Community Relations
- Community Demographics

TOPIC II: Administration and Organization

Categories:
- Administrative Organization
- Food Services
- Safety
- Facilities
- Budget/Other Funds

TOPIC III: Personnel

Categories:
- Staffing
- Staff Development/In-Service

TOPIC IV: Program

Categories:
- Recent Systemwide Approaches
- Instructional Approach
  - Art
  - Business Education
  - Career Education
  - Cooperative Vocational Education
  - English Language Arts
  - Foreign Language Arts
  - Health Education
  - Home Economics
  - Industrial Education
  - Mathematics
  - Multidisciplinary Programs
  - Music
  - Physical Education
  - Reading Language Arts
  - Science
  - Social Studies
  - Handicapped and Other Special Needs
- Instructional Equipment
- Extra-Curricular

TOPIC I: STUDENT-COMMUNITY CHARACTERISTICS

Category: Enrollment and Attendance

Item	1977-1978 N	1977-1978 %	1978-1979 N	1978-1979 %
Average Student Attendance.....				
Students Transported.....				
Student Mobility Rate.....			N/A	

Grade	9/30/77 1977-78 N	9/30/77 1977-78 %	3/30/79 1978-79 N	3/30/79 1978-79 %
TOTAL.....		100.0		100.0
Special Education/ (Self-Contained...				
Head Start.....				
Grade 6.....				
Grade 7.....				
Grade 8.....				
Grade 9.....				

Race	9/30/77 1977-78 N	9/30/77 1977-78 %	3/30/79 1978-79 N	3/30/79 1978-79 %
GRAND TOTAL.....		100.0		100.0
White.....				
TOTAL MINORITY.....				
American Indian.....				
Asian.....				
Black.....				
Hispanic.....				

Sex	9/30/77 1977-78 N	9/30/77 1977-78 %	3/30/79 1978-79 N	3/30/79 1978-79 %
Male.....				
Female.....				

Enrollment Trends

Grade	Recent History 1972	1973	1974	1975	1976	Projections 1977	1978	1979	1980	1981	1982
6											
7											
8											
9											
Total											

Other Data:

STUDENT-COMMUNITY CHARACTERISTICS

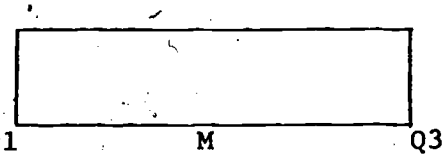
Category - Test Data

Grade 7 - 1977-78 School Year

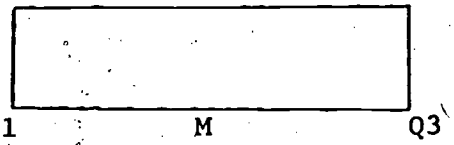
Scholastic Aptitude	School Average Standard Age Score (S.A.S.)	S.A.S. Expressed as National Percentile
Norm	100	50
Cognitive Abilities Test (CAT) Verbal Quantitative Nonverbal		
Achievement	**School Average Grade Equivalent Score (G.E.)**	**G.E. Expressed as a National Percentile**
Norm	7.6	50
Iowa Tests of Basic Skills (ITBS) Vocabulary Reading Comprehension		
Spelling Capitalization Punctuation Language Usage		
Map Reading Reading Graphs & Tables Knowledge & Use of Reference Materials		
Math Concepts Math Problem Solving		

Percentile Rank for the Student Scoring
First Quartile (Q1), Median, and Third Quartile (Q3)

Grade 7 CAT Verbal



Grade 7 Composite



STUDENT-COMMUNITY CHARACTERISTICS

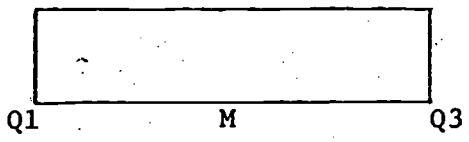
Category - Test Data

Grade 9 - 1977-78 School Year

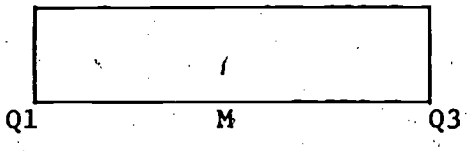
Scholastic Aptitude	School Average Standard Age Score (S.A.S.)	S.A.S. Expressed as National Percentile
Norm	100	50
Cognitive Abilities Test (CAT) Verbal Quantitative Nonverbal		
Achievement	**School Average Grade Equivalent Score (G.E.)**	**G.E. Expressed as a National Percentile**
Norm	9.3	50
Iowa Tests of Basic Skills (ITBS) Vocabulary Reading Comprehension		
Spelling Capitalization Punctuation Language Usage		
Map Reading Reading Graphs & Tables Knowledge & Use of Reference Materials		
Math Concepts Math Problem Solving		

Percentile Rank for the Student Scoring
First Quartile (QI), Median, and Third Quartile (Q3)

Grade 9 CAT Verbal



Grade 9 Composite



STUDENT-COMMUNITY CHARACTERISTICS

Category: Test Data

Maryland Functional Reading Test Results for October 1978 Administration

	Percent of Students Scoring at Least 80 Percent				
Number of Students	Locating References	Understanding Forms	Gaining Information	Following Directions	Total Test

*MCPS Functional Mathematics Test Results - November 1978 Administration
Grade 9

Number of Students PASSING ALL OBJECTIVES
Number of Students Who Still NEED REMEDIATION

Students

*MCPS Basic Proficiency Test in Writing - Fall 1978 Administration

Number of Students Needing Remediation	Completing Forms	Writing Directions	Recognizing and Writing Related Sentences		
			A	B	C

	Writing Letter and Envelopes				
	B	C	Spelling	Identifying Main Points	Editing and Proofreading

*Optionally filled in by school as no information available centrally

STUDENT-COMMUNITY CHARACTERISTICS

Category - Test Data

School Results for Longitudinal (L) and Non-Longitudinal (NL) Groups

Scores reported are the standard age group (SAS), grade equivalent (GE), and national percentile rank (PR), of the student with mean score.

	Number Taking Composite		CAT VERBAL				ITBS Composite			
			L		NL		L		NL	
Grade	L	NL	SAS	PR	SAS	PR	GE	PR	GE	PR

STUDENT-COMMUNITY CHARACTERISTICS

Category: Handicapped and Other Special Needs

Unduplicated Level Totals By Group - March 1979

Group	Number of Students	Group	Number of Students
Mentally Retarded		Gifted and Talented	
Speech Impaired		Disadvantaged	
Auditory Impaired		Emotionally Disrupted	
Visually Handicapped		Other Language Speaker	
Specific Learning Disability		Other (specify)	

Duplicated Level Totals By Program - March 1979

Program	Level 10	Level 20	Level 30	Level 40	Level 50	Total
Special Education						
Middle/Secondary Alternative						
Title I						
Head Start						
ESOL						
Auditory						
Speech and Language						
Vision						
Other (Specify)						

Recommended Service Not Being Provided - March 1979

Program	Level 10	Level 20	Level 30	Level 40	Level 50	Total
(Specify)						

STUDENT-COMMUNITY CHARACTERISTICS

Category: Suspension and School Damage

Student Suspensions

Year	Total Number	% of Minorities	Average Length Total	Average Length Minor
Past				
Current				
Next				

Property Loss

	7/1/77-6/30/78	7/1/78-12/31/79
Property Destruction		
Restoration of Glass Windows		
Theft		
Total		
Minus Restitution		
Net Cost		
Fire Loss		
Number of Unlawful Entries		

Other Data:

STUDENT-COMMUNITY CHARACTERISTICS

Category: School-Community Relations

Except for the community survey, standardized data is not generally available for this category. The community survey results can be utilized for this purpose, although you will need to select appropriate information to consider. You may have some other data sources which can be examined. Either attach relevant information of summarize below:

STUDENT-COMMUNITY CHARACTERISTICS

Category: Community Demographics

Significant Changes in Housing Patterns

(Within the last year, i.e., new apartments planned, elimination of low cost housing, etc.)

Other Data:

TOPIC II: ADMINISTRATION AND ORGANIZATION

Category: Administrative Organization

Item	1977-78	1978-79
Hours of School Day.....		
Marking Period.....	weeks	weeks
*Student/Professional Staff Ratio.....		
Feeder Schools.....		
Receiving Schools.....		

Other Data:

*For Secondary Schools: A/B

A (numerator): Regular Student Enrollment
includes: all regular students
does not include: Special education students in self-contained classes

B (denominator): Sum of Full-Time Equivalent of -
regular classroom teachers
reading teachers
ESOL, bicultural teachers
other professional and administrative

does not include:
Special education classroom teachers
resource room teachers
special needs teachers

ADMINISTRATION AND ORGANIZATION

Category: Food Services

	Prior Year*		Current Year*	
	N	%	N	%
Total		100		100
Purchasing Lunch				
Free Lunch				
Reduced Lunch				
Purchasing Milk Only				
Purchasing A La Carte Food Only				
Breakfast Program				

Other Data:

*Based on the average student participation in the food program for the same one-month period each year.

ADMINISTRATION AND ORGANIZATION

Category: Safety

Year	Student Accidents Reported	Staff Accidents Reported
Prior		
Current		

Other Data:

ADMINISTRATION AND ORGANIZATION

Category: Facilities

Site, Capacity, Room Use - This and Adjacent Schools

School	Site Acres	Capacity Range	Rooms	Actual Current Enrollment	Current Use of Rooms				
					Regular Classes	Spec. Ed	Spec. or Alt Prog.	Joint Occ..	Other Use

	Entire Building	Number of Rooms	Other Space
Air Conditioning			

Scheduled Modernization/Renovation

Year	Description	Estimated Cost

Year Scheduled for Possible Closing Study _____

Other Data:

Facility Utilization

	Prior Year	Current Year	Next Year
1. Number of standard classrooms used for:			
English.....	_____	_____	_____
Social Studies.....	_____	_____	_____
Mathematics.....	_____	_____	_____
Foreign Language...	_____	_____	_____
Special Education..	_____	_____	_____
2. Number of specialized Classrooms used for:			
Science.....	_____	_____	_____
Business Education.	_____	_____	_____
Industrial Arts....	_____	_____	_____
Home Economics.....	_____	_____	_____
Music.....	_____	_____	_____
Art.....	_____	_____	_____
3. Number of gymnasiums.....	_____	_____	_____
4. Number of auxiliary physical education rooms.....	_____	_____	_____
Total number of teacher stations (count each gymnasium as two T,S.).....	_____	_____	_____

Capacity - Each T.S. times 25 ..... _____

Your estimate of capacity..... _____

In your opinion does the present rated capacity of your building (_____) adequately reflect your current usage and pupil needs?

Yes _____ No _____

If answer is no, please explain on another sheet of paper.

5. Teaching stations accommodating a joint occupant and/or special or alternative programs, please identify, e.g., adult education. (The use identified must require that the teaching station not be available for regular school program use during the school day.)

ADMINISTRATION AND ORGANIZATION

Category: Budget/Other Funds

Standardized data is not presently available for this category, therefore, you have flexibility in deciding upon what to include and how. You may wish to make year-to-year comparisons between allocations, activity funds, and even PTA income and set corresponding objectives.

TOPIC III: PERSONNEL

Category: Staffing

Instructional Staff	1977-78 N	1977-78 FTE	1978-79 N	1978-79 FTE
GRAND TOTAL				
PROFESSIONAL STAFF TOTAL				
Regular Classroom Teachers				
Special Education Classroom Teachers				
Reading Teachers				
Resource Room Teachers				
English for Speakers of Other Languages, Bicultural Teachers				
Special Needs Teachers				
Other Professional/Administrative Staff				

Sex	1977-78 N	1977-78 %	1978-79 N	1978-79 %	Race	1977-78 N	1977-78 %	1978-79 N	1978-79 %
Male					White				
Female					Minority				

	1977-78 N	1977-78 FTE	1978-79 N	1978-79 FTE
INSTRUCTIONAL AIDES TOTAL				
Regular Instructional Aides				
Special Education Aides				
Instructional Materials Center Aides				

Staff Utilization Report (Includes Aides)

PERSONNEL

	Prior Year	Current Year	Next Year
Secretarial Staff			
Building Service Staff			
Staff Turnover Rate			
Staff Requests for Transfer			
Number Staff Absence (over 15 days)			

Other Data:

PERSONNEL

Category: Staff Development/In-Service

PROFESSIONAL STAFF DATA

Highest Degree Status	1977-78 N	1977-78 %	1978-79 N	1978-79 %
TOTAL.....				
Non-Degree.....				
Bachelor's.....				
Master's.....				
Master's + 30.....				
Doctoral.....				

Years of Experience	1977-78 N	1977-78 %	1978-79 N	1978-79 %
TOTAL.....				
4 or less.....				
5-14.....				
15-24.....				
25-34.....				
35 or more.....				

Brief Description of Current Emphasis for In-Service

Planned Emphasis next year

Other Data:

PROGRAM

Category: Recent Systemwide Approaches

Instructional Systems	Pilot Year	Implementation Year
Math Reading/Language Arts Science Social Studies		
Interrelated Arts Prototype Teacher Planning STEP Other:		

INSERT COURSE OFFERINGS BULLETIN

TOPIC IV: PROGRAM

Category: Instructional Approach

Describe the general instructional approach for each of the basic programs. Indicate if different strategies are used at different grade levels or courses.

Art -

Business Education -

Career Education -

Cooperative Vocational Education -

English Language Arts -

Foreign Language Arts -

Health Education -

Home Economics -

PROGRAM

Industrial Education –

Mathematics –

Multidisciplinary Programs –

Music –

Physical Education –

Reading Language Arts –

Science –

Social Studies –

Handicapped and Other Special Needs –

Other Data:

PROGRAM

Category: Instructional Equipment

List Numbers of Items in School Instructional Equipment:

_____	Movie Projectors	_____	Record Players
_____	Slide Projectors	_____	TV Monitors
_____	Overhead Projectors	_____	TV Tape Recorders
_____	Reel-to-Reel Tape Recorders	_____	_____
_____	Cassette Tape Recorders	_____	_____

List textbooks for the basic programs (where textbooks are issued to every student). Indicate if different textbooks are used at different grade levels or for different courses.

Reading/Language Arts - _____

_____

_____

Math - _____

_____

_____

Social Studies - _____

_____

_____

Science - _____

_____

_____

Other Data:

PROGRAM

Category: Extra-Curricular

Standardized data is not presently available for this category, therefore, you have flexibility in what data sources you use. You might consider extra-curricular stipends, number of students participating, etc.

SCHOOL INFORMATION SUMMARY

Senior High School

School Name...

Location.....

Principal.....
Telephone.....

School Number...
Area.....

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TOPIC I: Student-Community Characteristics

Categories:
- Enrollment and Attendance
- Test Data
- Handicapped and Other Special Needs
- Student Behavior/School Climate
- School Community Relations
- Community Demographics

TOPIC II: Administration and Organization

Categories:
- Administrative Organization
- Food Services
- Safety
- Facilities
- Budget/Other Funds

TOPIC III: Personnel

Categories:
- Staffing
- Staff Development/In-Service

TOPIC IV: Program

Categories:
- Instructional Approach
- Art
- Business Education
- Career Education
- Cooperative Vocational Education
- Driver Education
- English Language Arts
- Foreign Language Arts
- Health Education
- Home Economics
- Industrial Education
- Mathematics
- Multidisciplinary Programs
- Music
- Physical Education
- Science
- Social Studies
- Handicapped and Other Special Needs
- Instructional Equipment
- Extra-Curricular

TOPIC I: STUDENT-COMMUNITY CHARACTERISTICS

Category: Enrollment and Attendance

Item	1977-1978 N	1977-1978 %	1978-1979 N	1978-1979 %
Average Student Attendance.....				
Students Transported.....				
Student Mobility Rate.....			N/A	

Grade	9/30/77 1977-78 N	%	3/30/79 1978-79 N	%
TOTAL.....		100.0		100.0
Special Education/ (Self-Contained...				
Head Start.....				
Grade 9.....				
Grade 10.....				
Grade 11.....				
Grade 12.....				

Race	9/30/77 1977-78 N	%	3/30/79 1978-79 N	%
GRAND TOTAL.....		100.0		100.0
White.....				
TOTAL MINORITY.....				
American Indian.....				
Asian.....				
Black.....				
Hispanic.....				

Sex	9/30/77 1977-78 N	%	3/30/79 1978-79 N	%
Male.....				
Female.....				

Enrollment Trends

Grade	Recent History 1972	1973	1974	1975	1976	1977	1978	1979	Projections 1980	1981	1982
9											
10											
11											
12											
Total											

Other Data:

STUDENT-COMMUNITY CHARACTERISTICS

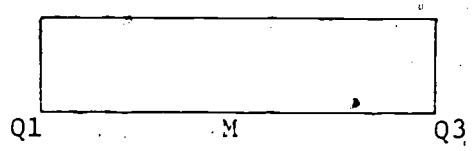
Category - Test Data

Grade 9 - 1977-78 School Year

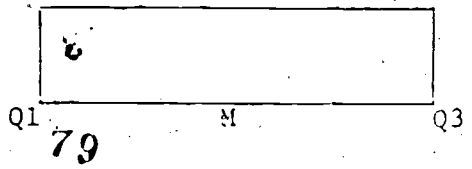
Scholastic Aptitude	School Average Standard Age Score (S.A.S.)	S.A.S. Expressed as National Percentile
Norm	100	50
Cognitive Abilities Test (CAT) Verbal Quantitative Nonverbal		
Achievement	**School Average Grade Equivalent Score (G.E.)**	**G.E. Expressed as a National Percentile**
Norm	9.3	50
Iowa Tests of Basic Skills (ITBS) Vocabulary Reading Comprehension		
Spelling Capitalization Punctuation Language Usage		
Map Reading Reading Graphs & Tables Knowledge & Use of Reference Materials		
Math Concepts Math Problem Solving		

Percentile Rank for the Student Scoring
First Quartile (QI), Median, and Third Quartile (Q3)

Grade 9 CAT Verbal



Grade 9 Composite



STUDENT-COMMUNITY CHARACTERISTICS

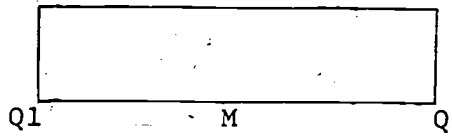
Category - Test Data

Grade 11 - 1977-78 School Year

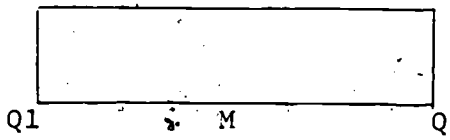
Scholastic Aptitude	School Average Standard Age Score (S.A.S.)	S.A.S. Expressed as National Percentile
Norm	100	50
Cognitive Abilities Test (CAT) Verbal Quantitative		
Achievement	School Average Standard Age Score (S.S.)	S.S. Expressed as National Percentile
Norm	50	50
Tests of Academic Progress (TAP) Social Studies Mechanics of English Science Reading Mathematics Literature		

Percentile Rank for the Student Scoring First Quartile (QI), Median, and Third Quartile (Q3)

Grade 11 CAT Verbal



Grade 11 Composite



STUDENT-COMMUNITY CHARACTERISTICS

Category - Test Data

Maryland Functional Reading Test Results for October 1978 Administration

Number of Students	Percent of Students Scoring at Least 80 Percent				
	Locating References	Understanding Forms	Gaining Information	Following Directions	Total Test

*MCPS Functional Mathematics Test Results - November 1978 Administration, Grade 9

Number of Students PASSING ALL OBJECTIVES
Number of Students Who Still NEED REMEDIATION

Mathematics Deficient Students from Grade 9 Tests

	Grade 10	Grade 11	Grade 12
Number of Students			

*MCPS Basic Proficiency Test in Writing - Fall 1978 Administration

Number of Students Needing Remediation	Completing Forms	Writing Directions	Recognizing and Writing Related Sentences		
			A	B	C

	Writing Letter and Envelopes		Spelling	Identifying Main Points	Editing and Proofreading
	B	C			

*Optionally filled in by school as no information available centrally

STUDENT-COMMUNITY CHARACTERISTICS

Category - Test Data

School Results for Longitudinal (L) and Non-Longitudinal (NL) Groups

Scores reported are the standard age group (SAS), grade equivalent (GE), and national percentile rank (PR), of the student with mean score.

Grade	Number Taking Composite		CAT VERBAL				ITBS.		Composite	
			L		NL		L		NL	
	L	NL	SAS	PR	SAS	PR	GE	PR	GE	PR

STUDENT-COMMUNITY CHARACTERISTICS

Category: Handicapped and Other Special Needs

Unduplicated Level Totals By Group - March 1979

Group	Number of Students	Group	Number of Students
Mentally Retarded		Gifted and Talented	
Speech Impaired		Disadvantaged	
Auditory Impaired		Emotionally [illegible]ed	
Visually Handicapped		Other Language Speaker	
Specific Learning Disability		Other (specify)	

Duplicated Level Totals By Program - March 1979

Program	Level 10	Level 20	Level 30	Level 40	Level 50	Total
Special Education						
Middle/Secondary Alternative						
Title I						
Head Start						
ESOL						
Auditory						
Speech and Language						
Vision						
Other (Specify)						

Recommended Service Not Being Provided - March 1979

Program	Level 10	Level 20	Level 30	Level 40	Level 50	Total
(Specify)						

STUDENT-COMMUNITY CHARACTERISTICS

Category: Suspension and School Damage

Student Suspensions

Year	Total Number	% of Minorities	Average Length Total	Average Length Minor
Past				
Current				
Next				

Property Loss

	7/1/77-6/30/78	7/1/78-12/31/79
Property Destruction		
Restoration of Glass Windows		
Theft		
Total		
Minus Restitution		
Net Cost		
Fire Loss		
Number of Unlawful Entries		

Other Data:

STUDENT-COMMUNITY CHARACTERISTICS

Category: School-Community Relations

Except for the community survey, standardized data is not generally available for this category. The community survey results can be utilized for this purpose, although you will need to select appropriate information to consider. You may have some other data sources which can be examined. Either attach relevant information of summarize below:

STUDENT-COMMUNITY CHARACTERISTICS

Category: Community Demographics

Significant Changes in Housing Patterns

(Within the last year, i.e., new apartments planned, elimination of low cost housing, etc.)

Other Data:

TOPIC I. ADMINISTRATION AND ORGANIZATION

Ca[illegible] Administrative Organization

Item	1977-78	1978-79
Hours of School Day.....		
Marking Period.....	weeks	weeks
*Student/Professional Staff Ratio.....		
Feeder Schools.....		

Other Data:

*For Secondary Schools: A/B

A (numerator): Regular Student Enrollment
includes: all regular students
does not include: Special education students in self-contained classes

B (denominator): Sum of Full-Time Equivalent of -
regular classroom teachers
reading teachers
ESOL, bicultural teachers
other professional and administrative
does not include: Special education classroom teachers
resource room teachers
special needs teachers

ADMINISTRATION AND ORGANIZATION

Category: Food Services

	Prior Year		Current Year	
	N	%	N	%
Total		100		100
Purchasing Lunch				
Free Lunch				
Reduced Lunch				
Breakfast Program				

Other Data:

ADMINISTRATION AND ORGANIZATION

Category: Safety

Year	Student Accidents Reported	Staff Accidents Reported
Prior		
Current		

Other Data:

ADMINISTRATION AND ORGANIZATION

Category: Facilities

Site, Capacity, Room Use - This and Adjacent Schools

School	Site Acres	Capacity Range	Rooms	Actual Current Enrollment	Current Use of Rooms				
					Regular Classes	Spec. Ed	Spec. or Alt Prog.	Joint Occ.	Other Use

	Entire Building	Number of Rooms	Other Space
Air Conditioning			

Scheduled Modernization/Renovation

Year	Description	Estimated Cost

Year Scheduled for Possible Closing Study _____

Other Data:

Facility Utilization

	Prior Year	Current Year	Next Year
1. Number of standard classrooms used for:			
English.....			
Social Studies.....			
Mathematics.....			
Foreign Language...			
Special Education..			
2. Number of specialized Classrooms used for:			
Science.....			
Business Education.			
Industrial Arts....			
Home Economics.....			
Music.....			
Art.....			
3. Number of gymnasiums.....			
4. Number of auxiliary physical education rooms....			
Total number of teacher stations (count each gymnasium as two T.S.).....			

Capacity - Each T.S. times 25 .....

Your estimate of capacity.....

In your opinion does the present rated capacity of your building (_____) adequately reflect your current usage and pupil needs?

Yes ____ No ____

If answer is no, please explain on another sheet of paper.

5. Teaching stations accommodating a joint occupant and/or special or alternative programs, please identify, e.g., adult education. (The use identified must require that the teaching station not be available for regular school program use during the school day.)

ADMINISTRATION AND ORGANIZATION

Category: Budget/Other Funds

Standardized data is not presently available for this category, therefore, you have flexibility in deciding upon what to include and how. You may wish to make year-to-year comparisons between allocations, activity funds, and even PTA income and set corresponding objectives.

TOPIC III: PERSONNEL

Category: Staffing

Instructional Staff	1977-78 N	1977-78 FTE	1978-79 N	1978-79 FTE
GRAND TOTAL				
PROFESSIONAL STAFF TOTAL				
Regular Classroom Teachers				
Special Education Classroom Teachers				
Reading Teachers				
Resource Room Teachers				
English for Speakers of Other Languages, Bicultural Teachers				
Special Needs Teachers				
Other Professional/Administrative Staff				

Sex	1977-78 N	1977-78 %	1978-79 N	1978-79 %
Male				
Female				

Race	1977-78 N	1977-78 %	1978-79 N	1978-79 %
White				
Minority				

	1977-78 N	1977-78 FTE	1978-79 N	1978-79 FTE
INSTRUCTIONAL AIDES TOTAL				
Regular Instructional Aides				
Special Education Aides				
Instructional Materials Center Aides				

Staff Utilization Report (Includes Aides)

PERSONNEL

	Prior Year	Current Year	Next Year
Secretarial Staff			
Building Service Staff			

Staff Turnover Rate
Staff Requests for Transfer
Number Staff Absence (over 15 days)

Other Data:

PERSONNEL

Category: Staff Development/In-Service

PROFESSIONAL STAFF DATA

Highest Degree Status	1977-78 N	1977-78 %	1978-79 N	1978-79 %
TOTAL.....				
Non-Degree.....				
Bachelor's.....				
Master's.....				
Master's + 30.....				
Doctoral.....				

Years of Experience	1977-78 N	1977-78 %	1978-79 N	1978-79 %
TOTAL.....				
4 or less.....				
5-14.....				
15-24.....				
25-34.....				
35 or more.....				

Brief Description of Current Emphasis on In-Service Programs

Planned Emphasis next year

Other Data:

INSERT COURSE OFFERINGS BULLETIN

TOPIC IV: PROGRAM

Category: Instructional Approach

Describe where programs differ from regular senior high school practices.

Art –

Business Education –

Career Education –

Cooperative Vocational Education –

Driver Education –

English Language Arts –

Foreign Language A

Health Education –

PROGRAM

Home Economics -

Industrial Education -

Mathematics -

Multidisciplinary Programs -

Music -

Physical Education -

Science -

Social Studies -

Handicapped and Other Special Needs

PROGRAM

Other Data:

PROGRAM

Category: Instructional Equipment

List Numbers of Items in School Instructional Equipment:

____	Movie Projectors	____	Record Players
____	Slide Projectors	____	TV Monitors
____	Overhead Projectors	____	TV Tape Recorders
____	Reel-to-Reel Tape Recorders	____	_____
____	Cassette Tape Recorders	____	_____

Other Data:

PROGRAM

Category: Extra-Curricular

Standardized data is not presently available for this category, therefore, you have flexibility in what data sources you use. You might consider extra-curricular stipends, number of students participating, etc.

Montgomery County Public Schools

MCPS COMPREHENSIVE PLANNING PROCESS

SUPPLEMENT TO SCHOOL INFORMATION SUMMARY

This supplement to the School Information Summary provides some additional data sources or data elements which a planner might wish to use to add to the school profile. These few pages are not meant as an exhaustive list, but rather as a means of sparking one's thinking for some categories, if more information than the profile is considered desirable.

Dr. I. L. Roy Stern, Associate
Superintendent for Program Development

Dr. Art Steller, Coordinator of
Systemwide Planning

Further Examples of Possible Data Sources for School Information Summary (Optional)*

Administrative Regulations

Affirmative Action Report

Agendas of Meetings

Attitudinal Inventories

Board of Education Policies

Community Surveys

Court Decisions

Criterion Referenced Test Scores

Established Standards

Evaluation Data

Faculty Discussions

Gallup Polls

Legislation - Federal, State, Local

Local Industry Employment Opportunities

Maryland State Department of Education Regulations

Middle States Evaluation

MCPS Digest of Educational Statistics

MCPS Goals of Education

National Curriculum Trends

Other Needs Assessments

Poll of Recent Graduates

Prior Budget Requests

Priorities of the Superintendent

Professional Literature

Program Evaluation Data of Various Kinds

Program of Studies

Recommendations of Consultants

Research Reports

Standardized Test Scores

Student Files

Task Force Reports

University Entrance Requirements

**Various Lists of Objectives

Various Memoranda

---

*These data sources may be used to verify needs when conducting a needs assessment.

**Unmet goals or objectives by definition are needs and represent an excellent source for determining needs.

TOPIC I: STUDENT-COMMUNITY CHARACTERISTICS

Category: Enrollment and Attendance

1. Dropout statistics
2. Number (or percent) of kindergarten pupils who attended preschool classes
3. Number of students completing specific advanced courses or enrolled in remedial courses
4. Number and percent of senior class students exceeding State graduation requirements by more than one course in science, mathematics, English, social studies, etc.
5. Course enrollment/grade distribution by race and sex

Category: Test Data

1. Number of students above grade level in math and reading (standardized tests)
2. Scores on MCPS developed tests, such as the instructional system for math or the instructional system for reading/language arts

Senior High

3. Scores on college admission tests
4. Comparisons of the number of National Merit Scholarship winners over a period of years

Category: Student Behavior/School Climate

1. Number of youths (14-21) who are employed
2. Number of youths (14-21) who have been arrested
3. Comparisons of the number and/or dollar value of college scholarships earned by students (counselor data) over a period of years
4. Number (or percent) of honor roll students or National Honor Society members
5. Planned careers of students (counselor data)
6. Number and percent of graduating class going to college, post high school training, jobs, etc.
7. Percentage of student grades in various subjects (report cards)
8. Number of students failing two or more subjects (report cards)

Category: Community Demographics

1. Occupations of parents (permanent records)
2. Educational level of parents (permanent records)
3. Family size and composition (permanent records)
4. Languages spoken in home
5. Countries of origin of students (permanent records)
6. Facilities or resources which supplement school program, recreational, libraries, etc.
7. Average family income
8. Property values, average market price of family dwellings

Category: School Community Relations

1. Number of parental or other valunteers -- comparisons over a period of years
2. Percentage of parents joining PTA -- comparisons over a period of years
3. Percentage of parents attending PTA meetings -- comparisons over a period of years
4. Percentage of parents participating in parent-teacher conferences -- comparisons over a period of years
5. Number of parental complaints (telephone or correspondence log)
6. List of civic and community group memberships held by staff
7. Percentage of staff belonging to the local PTA

TOPIC III: PERSONNEL

Category: Staff Development/In-Service

1. Number of staff attending MCPS sponsored in-service programs (In-service Training Record)
2. List of professional organizational memberships held by staff
3. List of professional conferences or workshops attended by staff
4. List of professional journal subscriptions held by staff
5. List of college courses in which staff have enrolled

Montgomery County Public Schools

April 20, 1979

MCPS COMPREHENSIVE PLANNING PROCESS

"JUST WHAT IS A NEED, ANYWAY?"

This paper defines what will be considered a need so that planners can communicate more effectively with one another and proceed through the MCPS Comprehensive Planning Process and the Needs Assessment Process. Other planning papers describe these processes in detail.

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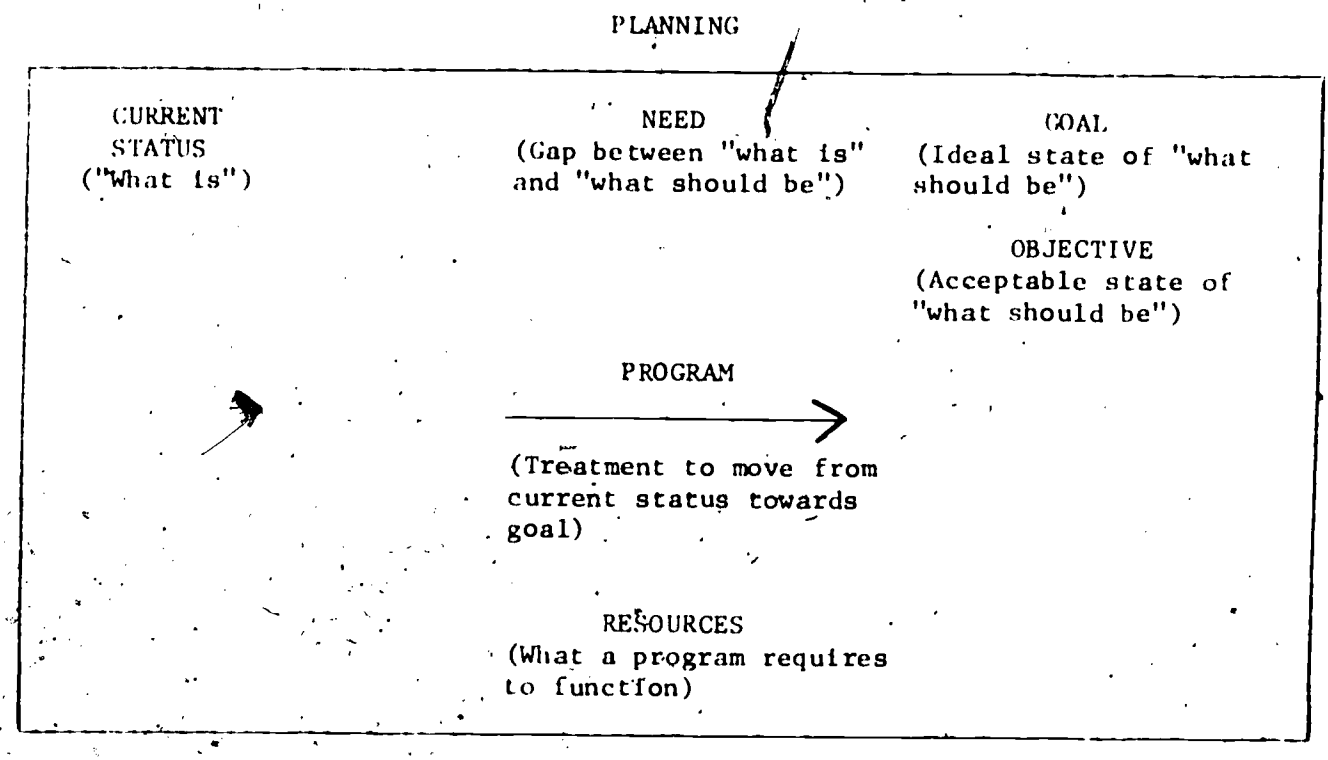
All organizations (regardless of the degree of sophistication of their management systems) must plan on the basis of meeting their needs. It is generally accepted that unmet needs erode the effectiveness of an organization. This paper and others related to the MCPS Comprehensive Planning Process attempt to describe and establish a common set of terms and a consistent approach for planning within MCPS. Since the concept of need is fundamental to the MCPS planning process, it is imperative that it be understood and treated in a like fashion throughout the system.

Definition of a Need

A need is defined as the discrepancy between "what is" and "what should be." It is important to realize that in practice "what should be" represents an acceptable condition, not necessarily an ideal state.

Goals (or objectives), programs, or resources are often confused with needs. A goal (or objective) is an example of "what should be." While both goals and objectives refer to "what should be," a goal represents an ideal state with an objective describing the acceptable state. Therefore, a need exists when a goal or objective is not being met. A program is the prescribed treatment to meet a need. Resources (time, money, books, people, etc.) are what a program requires to function and do not constitute a need. For example, the MCPS approved formulas for resource allocations (such as the one for textbooks), even if unfulfilled, do not identify "needs." Even though resources are necessary and unmet allocation formulas may be used as part of a rationale for the resources, they are not "needs." Needs are expressed as gaps between the expectations of results and the present reality. Planning is the operation which draws a relationship between the current status, need, goal, objective, program, and resources. The relationship between these terms can be illustrated by the following:



Previous Schematic with an Example

PLANNING

CURRENT STATUS	NEED	GOAL
Fifteen percent of the third graders are reading below grade level.	The number of third graders reading below grade level should be (needs to be) reduced.	100 percent of the third graders should be reading at or above grade level.
	PROGRAM → The MCPS Instructional System for Reading/ Language Arts (ISRLA) could be implemented. (This is one alternative.)	OBJECTIVE 90 percent of the third graders should be reading at or above grade level on next year's testing results.
	RESOURCES - List of Performance Objectives (ISR/LA); Instructional Guides (ISR/LA); Annotated Bibliography (ISR/LA); Instructional Materials Sixty Minutes Per Day, Etc.	

Examples of Statements of Needs

In the following examples, the improved version is more specific:

Need: To improve the school appearance and maintenance

Improved Statement: Student observance of the rules relating to the treatment of school property, both inside and outside the building, should not be evidenced by littering, writing graffiti, and damaging shrubbery.

Need: To improve communication within Office X

Improved Statement: Important information relating to new job assignments should be speedily communicated to all involved within the office, and there should be increased opportunity for comment and reconsideration before the job is begun.

Other Samples

For each of the samples below, the first statement describes the current status while the second is reworded as a need. The former might be the initial thought which triggers its identification as a need.

Current Status:	Our junior high students are illiterate in their knowledge of computers, as compared with students in other MCPS schools.
Need Statement:	Our junior high students are presently illiterate with respect to computers compared with their counterparts in other MCPS schools, while they should be at least as knowledgeable.
Current Status:	Social studies textbooks and other instructional materials on hand do not match the MCPS curriculum.
Need Statement:	Social studies textbooks and other instructional materials should correlate to the MCPS curriculum, since they do not presently.
Current Status:	The directions for the Comprehensive Planning Process materials are perceived as being ambiguous by some program managers.
Need Statement:	The directions for the Comprehensive Planning Process are perceived as being ambiguous by some program managers who should find the directions easy to comprehend and follow.
Current Status:	Primary children have insufficient physical education instruction (in terms of time) from the specialists and are doing poorly in basic activities.
Need Statement:	Most primary children are not able to achieve the objectives in the physical education curriculum, while 80 percent of them should be able to do so.
Current Status:	The math subtest upon which the intermediate children score the lowest is measurement using standard units.
Need Statement:	The intermediate children should score approximately as well on the subtest dealing with measurement using standard units as on the other subtests, although they are currently doing very poorly on this subtest.

Considerations When Identifying Needs

The identification of needs is a value-laden process, as differences may become apparent concerning what is labeled as a discrepancy. Opinions may differ as to "what is" or "what should be" or both. The identification of a need may be done by MCPS staff, people associated with MCPS, or persons unaffiliated with the organization. In either case, each statement of need must be assessed to confirm its validity.* Without this assessment, needs are merely unsubstantiated desires or wants. Subsequent to an assessment, a verified need carries with it no guarantee that it will be resolved. Priorities must be set and approvals secured.

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*See MCPS Needs Assessment Process.

Needs to be assessed should be selected on the basis of a balanced look at a school or department. In general, some needs will be related to student performance or instruction. Most needs will probably be described in terms of established measures of productivity, such as test scores, costs for bus transportation, incidents of vandalism, etc. Some needs on process-oriented topics like morale, decision making, attitude, cooperation, etc., should be included. A need could indicate a new or revised policy, regulation, or procedure would be required.

One should be cautious that the ease of compiling information to support statements of needs does not inadvertently become the reason for choosing the needs. Where possible or practical, comparative data should be examined to assertain if another unit would also consider a particular item a need. It is the responsibility of supervisors to make these comparisons.

Some needs may be identified by someone other than the person(s) responsible for resolving the need. For example, school-based staff could identify a need to develop an instructional guide which would be the responsibility of the Department of Instructional Planning and Development. Such needs should be communicated to the appropriate party or to an associate superintendent, if one is not certain as to where the responsibility lies.

If possible, needs should be worded to indicate the number of individuals affected by the need. Is "X" a need throughout the entire school or for certain courses or grade levels?

Responses to the following questions can also assist in identifying needs:

- What are we doing now that we really do well - and that we ought to continue? (This question is important for getting positive strokes; most of us work more effectively when we know we do some things pretty well.)
- What are we doing now that we do pretty well even though certain further refinements are necessary to assure desired results?
- What are we doing now that ought to be terminated? That is, what are we doing now, that doesn't make any difference anyway?
- What are we not doing that needs our immediate attention?[1]

Final Note

Try to word "needs" in terms describing gaps. If this seems inappropriate or not possible, the wording should communicate the intent of the need. Needs should not be worded as "a need for textbooks, more art specialist time, new materials," etc. It is more important that the most critical needs be identified and resolved than that their expression be perfectly phrased.

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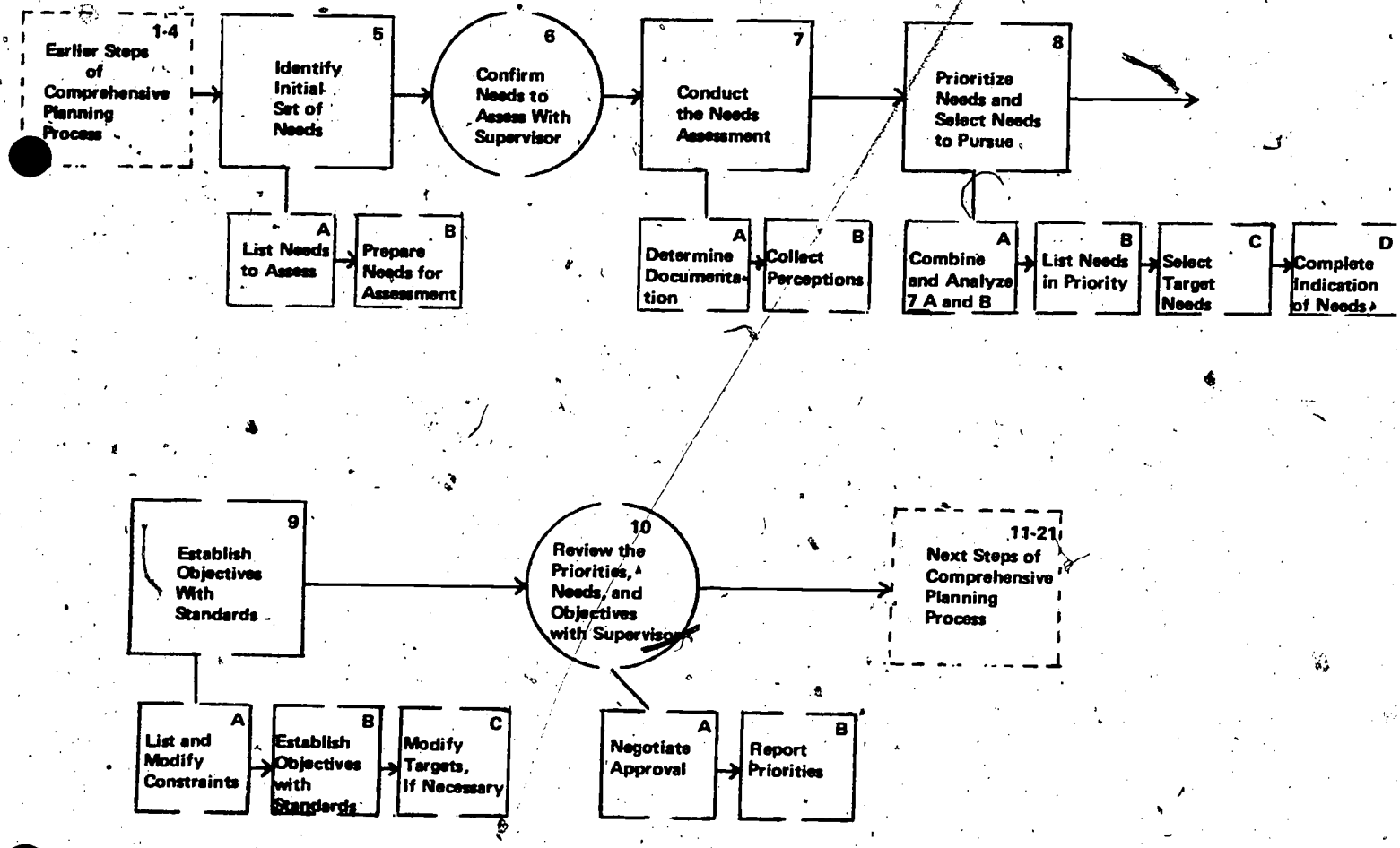
[1] James L. Olivero, "Helping Teachers Grow Professionally," Educational Leadership (Washington, D. C.: ASCD, December, 1976), pp. 195-197.

Montgomery County Public Schools

April 24, 1979

MCPS COMPREHENSIVE PLANNING PROCESS

MCPS NEEDS ASSESSMENT PROCESS



Dr. I. L. Roy Stern, Associate Superintendent for Program Development

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MCPS NEEDS ASSESSMENT PROCESS

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Foreword

Needs assessment involves the gathering, organizing, and interpreting of information to substantiate a need. This substantiation of a need determines its future throughout the process of planning; whether, in relation to all other examined needs, the need gets a high priority and emerges as a need to receive an allocation of resources.

But a needs assessment can also be undertaken in its own right, distinct from the rest of a formal planning process. As such, it represents simply a rational approach in which substantiating evidence is gathered and assessed prior to action. Needs assessment can thus be practiced as a skill to be later, together with other skills, incorporated into a full planning process.

The flowchart on the cover page represents an overview of the MCPS Needs Assessment Process. The planning outline, sample forms, and their directions constitute the main tools for conducting a needs assessment. The section entitled "Particulars of the Needs Assessment Process" amplifies the process with further explanation. It is suggested that a planner study the entire document and thereafter employ the planning outline and forms for guidance.

Throughout this and the other papers on the Comprehensive Planning Process, the major stages and steps of the process are referenced according to a consistent numbering system. Consequently, the MCPS Needs Assessment Process begins with Step 5. Substeps are, however, referenced differently in this paper from other papers on the MCPS Comprehensive Planning Process.

MCPS Needs Assessment Process

Needs assessments are conducted to identify the gaps between "what is" and "what should be." This gap or discrepancy is defined as a need. "What should be" is not to be considered a utopian state, but rather what conditions are acceptable. Priorities are set, objectives with standards formulated, and plans then created for closing as many gaps as possible.

A needs assessment provides the foundation for educational planning. The allocation of available human and material resources should be based upon an identified priority of needs. An individual planner who has completed a needs assessment is able to plan, document, and support requests for resources.

The purpose of this paper is to describe the procedures for conducting a needs assessment in MCPS. The major MCPS organizational units which conduct needs assessments are divisions, departments, and the offices of associate superintendents at the central office level; schools and the area offices of associate superintendents for the school-based level; and the office of the superintendent at a systemwide level. The deputy superintendent's office and other organizational units reporting to the superintendent will be considered as part of the superintendent's office.

The ~~term~~ "planner" is used to indicate the head administrator (or designee) of each organizational unit when that individual is engaged in doing a needs assessment (which is a part of planning).

The process of doing a needs assessment must be flexible enough so that each school or organizational unit can make it personal, yet be sufficiently consistent so that data collected from all sources can be collated and synthesized. When each organizational unit has completed a needs assessment, the final product will be a hierarchy of needs for the system as a whole and needs specific for each level within the system.

A comprehensive review of the literature on needs assessment leads one to an inescapable conclusion: needs assessments are defined and conducted differently. By outlining the general procedures for performing a needs assessment, a common approach will become part of the standard means of operating in MCPS. The comprehensive systemwide planning process incorporates the assessment of needs as one of its basic building blocks. However, the identification and verification of needs is already underway in many areas of MCPS. Therefore, a description of this element of the planning process may be immediately valuable for those who wish to use it. Also, needs assessments should be designed to plug readily into the overall planning process, thus conserving energies in the future.

Several other aspects of the current and projected systemwide planning process will eventually be directly fused with the needs assessment process. For example, a system will be created for forecasting long-range needs, the product of which would be available when scanning one's long-range needs (Step 5 A5). A list of commonly identified needs in MCPS will be collected to be applied in Step 5 A4. The annaul community survey could be rewritten as an instrument for collecting perceptions relative to needs in MCPS.

The MCPS needs assessment process is designed for all organizational units regardless of the extent of assessment previously undertaken. The process can be entered at any point, if the prerequisite and required steps have already been achieved. For example, a junior high school may have a list of identified needs and some related documentation. The principal might enter the process by determining what documentation exists for each need (Step 7 A), by collecting the perceived needs of clients and staff (Step 7 B), or by determining the priority of needs (Step 8). Such a decision can only be made by pinpointing what one has already done. It is strongly recommended that, unless one begins with the first step given, a decision relative to where to begin be made in concert with one's supervisor. An influencing factor to keep in mind is that the allocation of resources will depend in part upon the documentation of needs.

It is suggested that the administrator in charge of each organizational unit create a planning committee or use an existing coordinating group as a planning committee to help throughout the process. The main purposes of a planning committee are to conduct the needs assessment, prioritize the findings (if not completed in the assessment itself), select needs to target, generate plans to resolve the needs, assist in implementing the plans, evaluate the results, and generally serve as a communication bond with others involved with the planning process. The composition of such a planning committee would probably have less than five members, since it is a working body. An administrator might decide that one or all of the above tasks will be done by a planning committee.

The planning outline on pages 3 and 4 lists the steps involved in conducting a needs assessment. Those items indicated with an asterisk (*) are essential for all needs assessments, although it is suggested that every step be utilized. The three columns on the right hand side of the form are to display for each step who is going to see that it is done, when it will be done, and that it is in fact done. The planning outline is to be used as a guide, once the remainder of this document has been digested.

Two forms are provided for the needs assessment process. The form entitled "Needs to Assess" is to be used in recording those needs which a planner will assess. The form is to be used also as a means for obtaining approval from one's supervisor to proceed.

The "Indication of Need" form is utilized at several points throughout the process. The information gleened from the needs assessment is summarized upon this form to be used in communicating with others when seeking to gain the approval and acceptance of targeted needs.

Planning Outline for Conducting a Needs Assessment

Planner _____ Unit _____

Activities	Responsibility	Time Line	Completed
*Step 5 - Identify Initial Set of Needs to Assess			
A. List Needs to Assess			
*1. List the known needs			
2. Survey people informally regarding needs			
3. Collect and review possible sources of needs			
4. Use an existing list of relevant needs. Modify, if necessary			
5. Scan long-range needs			
*6. Confirm the relevance of each need to mission			
*7. Submit those needs outside mission to whomever appropriate			
*8. Collect needs submitted by others as outside their mission; but relevant to your mission			
*B. Prepare Needs for Assessment			
1. Compile identified needs			
2. Confirm or reword to meet criteria for a need			
3. Eliminate those which are not feasible			
4. Analyze the range of needs			
5. Reduce to a manageable number			
6. Word for clarity			
7. Reference each need to a goal, policy, etc., or develop a rationale			
8. Finalize the list of needs to assess			
9. Respond to persons suggesting initial needs with their disposition			
*Step 6 - Confirm Needs to Assess With Supervisor			
*Step 7 - Conduct the Needs Assessment			
*A. Determine What Documentation Exists for Each Need			
1. Collect and review possible sources of data for information			
2. Summarize relevant data for each need			
3. Analyze the documentation to substantiate or refute each need			

*Essential for all needs assessments.

Activities	Responsibility	Time Line	Complete
4. Refine statements of needs, if necessary			
5. Determine if additional assessment should be done via perceptions of staff, students and/or the community			
B. Collect the Perceived Needs of Clients and Staff, as appropriate			
1. Identify participants and selection procedures			
2. Determine approach for collecting perceptions and analysis			
3. Prepare for the collection of perceptions			
4. Collect perceptions			
a) Ranking of importance			
b) Rating of attainment			
5. Compare perceptions of importance and attainment			
6. Summarize perceptual data with other documentation			
7. Reach consensus on needs and their relative order of priority (optional)			
*Step 8 - Prioritize Needs and Select Needs to Pursue			
A. Combine and Analyze Documentated Data with Perceptions Collected in Step 7 B (unless completed)			
*B. List All Needs in Order of Priority (unless completed)			
C. Select Some of the Highest Priority Needs as Targets to Resolve			
D. Complete Indication of Need for Each Targeted Need			
*Step 9 - Establish Tentative Objectives with Standards			
A. List Constraints and Determine Ways to Modify			
B. Establish Tentative Objectives with Standards Which When Achieved Will Resolve Targeted Needs			
C. Modify the Number of Targeted Needs, If Necessary			
*Step 10- Review the Priorities, Needs, and Objectives With Supervisor			
A. Negotiate Approval of Priorities, Needs and Objectives, If Necessary			
B. Report Priorities, Needs, and Objectives to Staff, Students, and the Community			

*Essential for all needs assessments.

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NEEDS TO ASSESS

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 4-6

School/Office/Department/Division/Unit | Area

List each identified need for which you are considering program or administrative changes. This includes needs with either positive or negative differences between "what is" and "what should be," i.e., performance expectations which may result in additions to the program or eliminations of current activities. For each needs statement, list source(s) of information showing an indication of need and an approved purpose. On Side 2 describe the method by which you plan to assess the needs. Use additional sheets as necessary to describe all needs.

A Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

B Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

C Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

D Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

E Preliminary Needs Statement

Indication of need:

Approved purposes:

117

onsidered for: (check one) ☐ Increased emphasis ☒ Reduced emphasis

F Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

G Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

H Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

Proposed method of assessing needs

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

INDICATION OF NEED

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 6-10

School/Office/Department/Division/Unit

Area

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

Statement of need

PRIORITY
No. ___ of ___

Topic

Category

Objectives with standards

Approved purpose(s) or rationale

Estimated savings (to be completed only for needs addressing reductions or eliminations.)

a. Number of person days: professional_____; supporting services_____.

b. Other:_____

Summary of needs assessment data

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

Particulars of the Needs Assessment Process

The following section amplifies the MCPS Needs Assessment Process with further explanation.

Introduction

Change is a constant which creates new needs and demands upon schools. Educators themselves facilitate change in their students which is learning. School systems also must learn to change. One approach for institutional self-renewal is to conduct needs assessments periodically and to act upon the results.

In general, a needs assessment is an organized attempt at making informed decisions about needs and the most productive order in which to tackle them. Needs are identified by progressing through a series of formal steps.

The term "needs assessment" has become rather popular in the literature and practice of education in the last few years. One initial reason for high interest is the logic of assessing needs as one of the first steps within the larger context of educational planning. The fact is that practitioners have found needs assessments a valuable tool.

Glenys Unruh makes the point that:

> ... prior to involvement in making major decisions, it is necessary to identify needs and concerns through some systematic way of involving a diverse constituency. Once the needs and concerns have been identified, listed, and sorted into personal concerns, institutional concerns, and societal concerns that affect the school, priorities can be assigned.*

A needs assessment is a formal process for identifying areas in which there exist discrepancies between expected and obtained results. Simply listing apparent needs in an organization can easily produce a host of items too lengthy to be effectively managed. Needs assessment procedures are designed to narrow this field to a list of unmet needs placed in order of priority. The process involves documenting needs through the perceptions of interested parties, accumulating objective facts and data, or, ideally, using both objective and subjective data.

As stated earlier, a need is defined as the difference between "what should be" and "what is." A goal is "what should be." Therefore, a need exists when a goal is not being met. Goals are often not clearly labeled as "goals," i.e., the Board of Education's policies, the Program of Studies, administrative regulations, the superintendent's priorities, legislative mandates, municipal laws, etc. Some of "what should be" has not been formally stated but traditionally functions as an "unwritten rule" or what might be called an assumed goal. Some examples are that each school will have a student safety patrol, each employee will make contributions above and beyond a written job description, each principal will encourage parental volunteers, etc. Phrased in another way, a need is the gap between what a goal prescribes and what the actual accomplishment describes.**

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*Glenys Unruh, "New Essentials for Curriculum Leadership," Educational Leadership (Washington, D. C.: Association for Supervision and Curriculum Development, May, 1976), p. 583.

**A need could also be the gap between what an objective prescribes and what the actual accomplishment describes. This level of refinement is not usually formalized to any significant extent for major planning purposes, except in specialized or technical areas. However, such needs may be acted upon; i.e., a student not accomplishing an instructional objective would receive special help from his or her teacher.

A representative cross section of the educational community -- staff, parents, nonparents, and, for some areas, students -- should participate in identifying the needs of MCPS organizational units. The public and the learners' perceptions of what the school system ought to be doing should be measured along with the opinions of the professionals. Values are important factors which determine what happens in public institutions. A comprehensive assessment of needs will weigh such values as initial input for the planning process. Otherwise, intense community values may manifest themselves in political action after plans have been set in motion. Through cooperatively arriving at the needs for the various levels of MCPS, ownership of the school system becomes increasingly more of a partnership.

A needs assessment would not rely solely upon perceptions, except in rare instances. A complete process buttresses the perceived needs of the educational community with objective facts and data. Usually additional documentation consists of evaluative data or measurements such as test scores or numbers of student suspensions. However, verdicts of court cases, new legislation, research findings, etc., are also valid indicators. Deliberate efforts should be made to pursue through documented information as close an approximation of reality as possible.

If the perceptions of need do not match reality, the differences should be reconciled. Both standardized and criterion-referenced test scores may indicate pupils are doing well in a subject, while the public believes them to be doing poorly. The probelm then is one of communication, or the parents not accepting the curriculum, not that the results of the particular instructional program are lacking. Of course, the testing program may require some study, if the results are in question.

To anyone engaging in a needs assessment, the most difficult issue is just what should be assessed. Some needs assessment models start with ranking (in terms of importance) and rating (in terms of attainment) goals or objectives and then translating those with high rankings and low ratings into needs. Some models use needs for the beginning point. This paper takes the position that starting with needs is more appropriate for MCPS. Consequently, the MCPS process does not require goals to be translated into needs as some models do. The rationale for such a stance is that MCPS should build upon what progress it has already made. The Goals of Education as adopted by the Board of Education in 1973 provide overall direction for the system. The Program of Studies, the Board of Education's policies, administrative regulations, etc., provide additional delineation of "what should be" in terms of approved purposes and means. Furthermore, various organizational units have developed mission statements and goals and objectives. The needs of any organizational unit, therefore, become the discrepancy between "what should be" (the goals) and "what is" in areas consistent with its mission.

An inherent assumption of the MCPS position on needs assessment is that the universe of expectations, approved purposes, and means or goals are not presently described, nor will they ever be, due in part to their fluid nature. However, needs can be assessed and utilized as information for planning. Identification of a heretofore unknown need should lead to the formulation of a clearly stated goal or purpose. Likewise, "unwritten goals" that relate to the emerging needs will thus become articulated.

Needs assessments may be conducted at any level of the school system. The Department of Instructional Planning and Development may decide to do a needs assessment to dtermine which curriculum area is most in need of further development. A high school athletic department could do a needs assessment to diagnose what discrepancies exist. An elementary principal might generate schoolwide priorities of need through use of a needs assessment.

Sometimes a second needs assessment is done to further refine a need or to examine the relative importance of the components of an overall need. Using the Department of Instructional Planning and Development as an example, reading achievement may emerge as a need. Another more detailed needs assessment might be conducted to analyze the component parts of reading comprehension, word analysis, appreciation, etc., with the intent of further defining the need. A second such needs assessment is usually called an "expanded needs assessment," although occasionally the literature uses this label for describing the collection of objective data.

Obviously, significant prodedural differences occur in performing a needs assessment at various levels of the system; however, the basic strategy is the same whether the needs assessment is an overall assessment or a more detailed (expanded) one.

Step 5 - Identify Initial Set of Needs to Assess

Prior to the actual appraising of needs, a preliminary reduction of the range of the content from all possible needs to a manageable number is required. Such a screening procedure is in a sense a "minineeds assessment," although effort spent at this point should be rudimentary. Nevertheless, a needs assessment cannot proceed without such preparation.

Step 5 A. List Needs to Assess

Selecting the topics that might emerge as needs is the most critical step of the needs assessment process. Everything which follows is built upon these preliminary needs. At this point the scope of the study is determined by narrowing what will be assessed. The universe of needs simply cannot be addressed. It is only those needs deemed the most critical or important that should be assessed.

1. List the Known Needs

Some needs are so obvious that a few minutes of reflective thought is all that is needed to recall them. Certain nagging problems may qualify as needs. Often a need has been known for some time, but other needs have taken precedence. In some instances a need has been acknowledged, but resources have not been allocated to resolve the need. After starting a list of known needs, it may be a good idea to set it aside for awhile and then come back to it. Once such an initial inventory of needs has been generated, it is time to involve other people.

2. Survey People Informally Regarding Needs

Another method for coming up with a list of needs to use in a more formal assessment is to survey people informally. Simply asking staff, parents, and students what the needs of the organization unit are will produce some very good items. Anyone who partakes of the services or uses the products of a given organizational unit, as well as the unit's members, should be eligible to suggest needs. School-based staff should be asked to contribute needs for consideration to the needs assessment processes of their area offices. Staff who work with central office departments should do likewise when these departments do needs assessments.

A brief period spent during meetings of the staff, PTA executive committee, student council, advisory committees, etc., should be sufficient for enlarging the initial list of needs. These groups should be cognizant that the intent is to identify some preliminary areas of need which will undergo additional examination. Otherwise they may expect formalized plans of action for meeting all of the needs they propose without confirmation of the needs. Suggested needs can be elicited by brainstorming "What are our needs?" or "What should we be doing that we are not doing now (or at least as well as we should be)?" No attempt should be made to evaluate comments or slow the flow of ideas. This feedback will probably require that some responses be combined and most will necessitate rewording. However, these activities can be effective thought provokers and lead-up exercises to the actual needs assessment.

3. Collect and Review Possible Sources of Needs

The chart below provides some sources from which extractions can be made concerning "what should be." In some of the given sources "what should be" is actually written in that format, while inferences are necessary in other cases. Once "what should be" has been clarified from these sources, discrepancies (or needs) from "what is" can be determined.

The possible sources from which needs can be drawn is quite large. The chart here is not meant to be all inclusive. When considering which sources to use in selecting needs for assessment, one can start with those sources that have dictated or suggested directions previously. There is no set method for reviewing such diverse documents, except perhaps skimming for germane statements. The most apparent items to include are mandated standards of directives which remain unmet.

The source of any need chosen for assessment should be accurately recorded and retained because it can be utilized to document the need and/or to provide a reference to approved MCPS purposes.

Further Examples of Possible Data Sources*

Administrative Regulations	MCPS Goals of Education
Affirmative Action Report	National Curriculum Trends
Agendas of Meetings	Other Needs Assessments
Attitudinal Inventories	Poll of Recent Graduates

*These data sources may be used to verify needs when conducting a needs assessment.

Further Examples of Possible Data Sources (Continued)

Board of Education Policies
Community Surveys
Court Decisions
Criterion Referenced Test Scores
Established Standards
Evaluation Data
Faculty Discussions
Gallup Polls
Legislation - Federal, State, Local
Local Industry Employment Opportunities
Maryland State Department of Education Regulations
Middle States Evaluation
MCPS Digest of Educational Statistics
Prior Budget Requests
Priorities of the Superintendent
Professional Literature
Program Evaluation Data of Various Kinds
Program of Studies
Recommendations of Consultants
Research Reports
Standardized Test Scores
Student Files
Task Force Reports
University Entrance Requirements
**Various Lists of Objectives
Various Memoranda

4. Use an Existing List of Relevant Needs. Modify, If Necessary

One of the best and simplest means of determining what needs to assess is to utilize a roster of needs which already exists. Some modifications might be necessary to be sure that such a list truly reflects the situation to be assessed. Obviously, if an appropriate list of needs is available, it will save time and effort.

Since schools are faced with similar issues and needs across the country, needs identified by one school are likely to be similar to the needs of another. Therefore, needs identified by another school in its needs assessment might provide a good launching pad. The needs recognized by another MCPS shcool would be especially worthy of deliberation, as the environment may closely resemble the school now doing the assessment. A search of the needs assessment literature will also reveal what other schools have determined their needs to be. The area offices or the various central office units may have difficulty in detecting a relevant list of needs already compiled through someone else's efforts.

It would be ususual if any existing list could be utilized intact without some additions or deletions. The modifications necessary to convert an available roster of needs to the immediate situation should be carefully considered. Minor alterations of wording may be needed. Entire statements of needs might have to be eliminated or added. The initial needs selected for formal assessment must be appropriate to the unit under examination.

The second cycle of doing a needs assessment should be based upon the results of the previous assessment. Thus, one does not have to continually recreate items to assess, but rather start with the list of needs identified previously.

**Unmet goals or objectives by definition are needs and represent an excellent source for determining needs.

5. Scan Long-Range Needs

The inclusion of needs that are forecast to emerge in several years is exceedingly valuable for assessment purposes, if available.

Educational planning would be greatly enhanced if it could concentrate upon meeting long-range needs. The trouble is that educational institutions do not usually have such information upon which to act. The reliability of such data is questionable, unless it has undergone rigorous analysis. Numerous techniques exist, and many more are under development, for predicting the future: trend analysis, social auditing, cross impact studies, etc. Unless one has access to structured forecasts of what needs are likely to emerge in the future, it is not suggested that such needs be incorporated into a needs assessment. The MCPS Comprehensive Planning Process will include a forecasting element which will provide such information.

The five-year plan for projected implementation of the MCPS instructional systems or other such plans should not be confused with forecasting. These plans have been formulated to meet a need that has been identified (although periodic reassessments are worthwhile to determine if the plan should be altered). A forecast is done to discover needs which may develop in the future. Needs assessments are more likely to deal with forecasts than projected plans. The overall planning process must incorporate both.

6. Confirm the Relevance of Each Need to Mission

The needs identified may legitimately impact those doing the identification, but some may still fall outside the school or organizational unit's mission. Some needs might best be addressed by other agencies in the community. Other needs might be more functionally related to another unit in MCPS than the one having done the identification. An example would be a school identifying a problem with the general upkeep of the buses which would be a need to be assessed by the Transportation Department rather than the school. In some cases joint assessment by two or more units would be the most effective tactic. The Department of Budget Planning and Development and another department using its services may both decide to assess some aspect of the budgeting process.

All of the needs which are formally assessed should be relevant to the mission of the unit doing the assessment. It is assumed that planners are conversant with the mission of their respective units and other MCPS units and can make this determination in spite of often overlapping responsibilities.

7. Submit Those Needs Outside Mission to Whomever Appropriate

Those needs which are outside the mission of the unit should be submitted to the appropriate MCPS unit or other agency. Within MCPS this sharing of information should be encouraged and openly exchanged. Special care and discretion should be taken when transmitting needs to organizations outside MCPS.

8. Collect Needs Submitted by Others as Outside Their Mission, But Relevant to Your Mission

Planner "A" will submit needs outside his or her mission to other planners who deal with that type of need. Planner "A" will in turn receive from these other planners some needs with which he or she works. Such cooperation and trading of information will greatly contribute to a valuable and realistic list of needs. A healthy by-product of this process is the fostering of communication between planners.

Step 5 B. Prepare Needs for Assessment

At this point the person(s) doing the needs assessment has identified some needs or at least what appear to be needs. Additional preparations are necessary prior to the actual needs assessment. What follows is a set of operations described separately, although in practice one would probably work on them concurrently.

1. Compile Identified Needs

The aforementioned activities have produced discrete lists of needs which are now ready for compilation. Some needs may best be handled by being blended together. For example, a need relative to disruptive student behavior in the lunchroom and another need detailing the same kind of behavior on the playground could be joined.

2. Confirm or Reword to Meet Criteria for a Need

A need in its formative stages may be difficult to articulate. Once phrased, it may not conform to the definition of being the difference between "what is" and "what should be." A clearly stated need describes the discrepancy which exists, not simply that X should be improved.

Example: Children should have better handwriting.

Discussion: Not only is it difficult to disagree with, the gap between expected and present performance is not communicated. Are all children doing poorly in handwriting or is there an identifiable group of children? Is the problem in the area of manuscript or cursive? Does the concern exist with all of the handwriting children do, when children are doing handwriting exercises, or only when children turn in papers when handwriting is not the main evaluation emphasis? Upon asking such kinds of questions, the need will become crystalized.

Improved Example: At the fourth, fifth, and sixth grade levels, our students do not practice the handwriting skills which they demonstrate in penmanship exercises.

Often wording a need so that the discrepancy is readily discernable can become a burdensome dilemma. The advice given here is to word each need as best one can. It is more important that the most critical needs be identified and resolved than that the wording describe a distinct measurable gap. The needs assessment process itself will foster a clearer meaning of the need as data is collected. After collecting and analyzing the assessment data, the statements of need are to be refined (Steps 7 A4 and 7 B).

Needs cannot be stated as resources, programs, or goals. Needs are related to desired outcomes, not means. An important criteria to use in wording needs is that they not be given as resources, programs, or goals. (See MCPS paper entitled "Just What Is a Need, Anyway?")

3. Eliminate Those Which are Not Feasible

Needs which are judged as not feasible to resolve should be eliminated before spending efforts upon their assessment. Reasons for such a judgment might be an astronomical high cost or a conflict with existing policy or laws. A previous attempt at resolving a need could indicate such constraints. While it can be argued that one should go ahead, assess the need, compile the data, and try again; people do get tired of "beating their heads against the wall." Also, there are undoubtedly a sufficient number of more feasible needs upon which to concentrate efforts.

4. Analyze the Range of Needs

The needs selected for assessment should provide a balanced look at the organizational unit. There would generally be some needs related to student performance and some to managerial concerns. Most needs will probably describe established measures of productivity: test scores, costs for bus transporation, incidents of vandalism, etc. Some needs should also be assessed on process-oriented topics like morale, decision making, commitment, cooperation, etc. If the initial list of needs does not reflect input from all aspects of the organization, additional or alternative needs should be considered.

5. Reduce to a Manageable Number

It is rare for an organization to attempt an assessment of more than 30 needs. The smaller the number of items, the more intense the analysis can be. Most often, 15 to 20 needs are examined by educational organizations. It is suggested that no more than 10 to 15 needs be assessed by MCPS units, so the analysis can be indepth and accurate. The actual number of items is best determined by the purpose of the assessment and the desired detail of the analysis. The needs must be few enough and extensive enough to make a meaningful impact as well as being manageable in the assessment process.

6. Word for Clarity

The needs must be worded so as to communicate their intent to the persons who will test their validity. Educational jargon should be avoided to improve clarity, particularly since noneducators will likely be participating in the assessment. If questionnaires are chosen for compiling perceptions of the needs, the working is vital.

7. Reference Each Need to a Goal, Policy, Etc., or Develop a Rationale

The needs which will be formally assessed should be referenced to an approval MCPS goal, policy, regulation, or other official indication of "what should be." If no such link is readily apparent, a rationale describing how the need relates to "what should be" would suffice. This correlation will help distinguish wishes from needs in terms of validation. An example of a need referenced to an approved MCPS goal is:

> Need: Nearly all students are performing poorly when doing exercises requiring critical thinking when most students should be able to perform satisfactorily.
>
> Reference: The MCPS Goals of Education, section on Intellectual Development.

8. Finalize the List of Needs To Assess

In summary, prior to assessment the list of needs should be reviewed to:

a) Confirm relevance to mission
b) Eliminate those needs which are not feasible
c) Analyze the range of needs
d) Reduce to a manageable number
e) Word for clarity
f) Reference each need to a goal or develop a rationale

Step 7 A. Determine What Documentation Exists for Each Need

When describing the gathering of existing information about needs, the professional literature usually labels the procedure an "expanded needs assessment" with the resulting data being "verified data." There is, however, little consistency concerning what specific data to collect. Some attempts are being made in various educational institutions, usually higher education, to develop a more standardized set of indices which would serve as documentation of needs. Until or unless such a data framework is utilized, the individual planner doing the needs assessment must decide upon the data to collect and analyze.

Two views on what data to gather when assessing needs follow:

> The proportions and actual numbers of students who fall below desired performance standards; Physical location where problems are most difficult; Hypothesized reasons performance falls below standards in different locations; Characterisitics of facilities, of staff, and of programs in relevant areas; General population characteristics in the area of concern; Implications of the needs assessment for the entire system, including areas where the problem is less severe or does not exist.*
>
> Background data about the student and the school are extremely helpful when interpreting the achievement data. In relation to the student, these might include the educational level and socioeconomic status of parents. For the school, commonly gathered data are the average class size, average per student cost, and major features of the curriculum and teaching methods used. If substantial persistent relationships can be found between the outcomes (that is, levels of achievement) and the inputs and processes, then decision makers have sturdy tools with which to direct efforts to improve the educational process.**

Another data problem is that available documentation which can be used to confirm or refute needs comes in many forms.*** Comparisons between subjective statements in memoranda supporting one need and a set of numbers supporting another must be made. No easy answers have been found to clear up this dilemma.

School information summaries have been provided those schools participating in the Comprehensive Planning Process, thus giving some valuable data to local planners.

One should be cautious that the ease of compiling assessment data may dictate the final priority of needs rather than the actual size of discrepancies. An example is the relative ease and reasonableness of using standardized test scores to document a need in mathematics. In contrast, a curriculum need in handwriting may be recorded by a couple of parental complaints and a few samples of poor penmanship. The greater the variety of information sources used, the greater the likelihood that the most critical needs will be correctly diagnosed.

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*U.S. Office of Education, "A Manual for Project Applicants and Grantees," Guidelines for Title III, section 306, Elementary and Secondary Education Act of 1965, mimiographed (Washington, D. C.: U.S. Office of Education, 1970), pp. 35-37.

**Stanley Ahmann, "Administering the Achievement Test Items," How Much Are Our Young People Learning? The Story of the National Assessment, ed. Donald Robinson. (Bloomington, Indiana: The Phi Delta Kappa Educational Foundation, 1976), p. 9.

***The sources of documentation employed earlier can also be applied to the assessment of needs.

A list of needs referenced to MCPS goals is now ready for assessment. The statements of needs and their references should be summarized on the "Needs to Assess" form, a sample of which can be found in this paper. This form is to be used when confirming the needs to assess with one's supervisor.

9. Respond to Persons Suggesting Initial Needs With Their Disposition

Every person or group who suggested an item for the needs assessment process should be notified as to its disposition. Persons who took the time to contribute should receive a reply. A particular need may have been modified, dropped, or included. A brief reason should be given if the suggested need is not being considered.

Step 6 - Confirm Needs to Assess With Supervisor

The preliminary needs statements should be submitted to one's supervisor for confirmation and/or adjustment. The planner should be aware of any areas his or her supervisor feels should be assessed prior to conducting the needs assessment. Otherwise a supervisor may be justified in believing that some essential items have been omitted.

At the same time the planner should know and share how he or she plans to conduct the needs assessment. After reading this document the planner should be fully prepared to describe how the assessment will be completed. It is important that the planner answer the questions: How will the needs be assessed? How will staff, students, and the community be involved?

It is suggested that this step be done in writing, rather that via an interview. However, if significant differences of opinions occur, a face-to-face meeting may be necessary. If not, the form "Needs to Assess" should be able to be passed back and forth for this purpose.

Step 7 - Conduct the Needs Assessment

A needs assessment broadly conceived is a collection of information on needs which is subsequently analyzed. A wealth of data is handy to MCPS planners. For this purpose previously compiled data should be examined as a first step in varifying a need. Many of the needs in MCPS have already been outlined through various examinations or studies. It is conceivable that sufficient information is already on hand to substantiate or refute a particular need without further assessment. If this is the case, it seems unnecessary to harvest additional opinions to reconfirm a need.

Most of the literature on needs assessments assumes a lack of data, especially when it comes to what people think about needs. MCPS community surveys, task force reports, advisory committees' reports, special interest group studies, etc., provide a great deal of information on perceptions. Ideally, MCPS staff engaging in a needs assessment would utilize both previously collected data or documentation and the perceptions of other staff and clients. The initial set of needs might help indicate the approach by their very nature. However, a decision on this matter is best made by the planner and his or her supervisor.

1. Collect and Review Possible Sources of Data for Information

For each need being assessed, all of the available sources of relevant documentation should be collected and reviewed. If at all possible, several different kinds of information for each need should be secured. Pertinent information should be retained throughout the assessment process so it can be shared with others.

2. Summarize Relevant Data for Each Need

The documentation which has been collected for each need should be concisely summarized. The wording should be written for easy assimilation and interpretation by persons unfamiliar with the original sources. Names, dates, numbers, etc., should be recorded on the form located at the front of this paper. Information both confirming or disputing each need must be provided for accurate evaluation. Besides aiding the analysis of the information, the condensed data can be used when discussing needs with decision makers or the public.

3. Analyze the Documentation to Substantiate or Refute Each Need

An analysis of the summarized data will lead to each need being confirmed or refuted. Most needs will probably be substantiated as needs, although some needs will emerge as more "in need" than others. The size of the discrepancies is a factor to be considered in the analysis.

4. Refine Statements of Needs, If Necessary

The information compiled may be sufficient to suggest refinement or alteration of one or more of the original statements of needs. An example would be a need relative to spelling achievement in an elementary school which may turn out to be true only for the upper grades.

5. Determine If Additional Assessment Should Be Done Via Perceptions of Staff, Students and/or the Community

In most cases, a needs assessment would involve formal staff, student, and community input with respect to the needs of any MCPS organizational unit. However, abundant information may be available without taking this step. Various surveys or task force reports which could be used in the assessment process contain the opinions of diverse parties. A school needs assessment would most likely include students and parents as participants. Some central office units may desire to use only documented data in their needs assessment. A decision in this matter is best made with one's supervisor.

Step 7 B. Collect the Perceived Needs of Clients and Staff, As Appropriate

The majority of the professional literature on needs assessments focus upon the collection of the perceptions of a diverse group of people. Common terms used to describe the results of such surveys are "perceived needs" or "felt needs." If the "perceived needs" of any particular segment of the community are documented and representative, it would not be necessary to collect their opinions again.

Oftentimes, representatives of the diverse groups gathered to contribute their thoughts for the needs assessment are asked to become further involved in planning as a planning committee. These individuals could be particularly helpful later in assessing the progress made toward meeting the needs. Dissemination of information would also benefit. The length of service or "turnover date" for such a planning committee should be communicated to those persons involved at an early stage so it is not perceived as a life commitment.

1. Identify Participants and Selection Procedures

Throughout this paper it has been suggested that a broad cross section of the community contribute to the needs assessment process. The views of the community can be solicitated through several different techniques. An open invitation could be extended to all persons residing within the boundaries of a school or area. Specific persons could be invited to participate. The composition of the representatives could be structured around various categories of people in the community. The latter would be done in keeping with MCPS guidelines and policies on community involvement. The kinds of people to be considered for participation in a school-based needs assessment are:

a) Supporting services staff
b) Students (usually junior/middle or senior high)
c) Representatives of various community organizations and/or agencies
d) Representatives from school affiliated groups
e) Parents
f) Nonparents
g) Classroom teachers and other certified staff
h) Administrative staff

It would be most difficult to list representatives for each central office unit; however, in general, the liaisons for these units and the area offices would be from any of the above groups with whom they regularly interact or for whom they provide a service. It might be desirable to include some persons with whom the unit typically has no contact to act as a counterbalance or neutral party.

Once the decision about which groups to involve is made, the number of participants needs to be determined. The total number of persons to involve will depend upon the approach selected for collecting their perceptions (see next section). In some cases the entire staff of a school might be involved. If representatives of a group are to be used, the planner may wish to choose the participants randomly, ask for volunteers, use designated leaders of the organized groups, or request the group to provide a representative(s). Some combination of these strategies could be utilized to meet local purposes.

Examples of lists of participants for two different settings follows:

Elementary School

Principal
Classroom teachers (16)
Art, music, etc., teachers (2)
Area office teacher specialist (1)
Taxpayer Association representative (1)
League of Woman Voters representative (1)
Senior Citizens Club (2)
Recreation Department (1)
Boy Scout Leader (1)
Girl Scout Leader (1)
Random selection of nonparents (2)
Random selection of parents (4)
PTA Executive Committee (8)
Elected fifth/sixth graders (4)

Department of Management Information and Computer Services

Director
Department staff (3)
Division of Systems Development (3)
Division of Data Processing (3)
Elementary school principal (1)
Middle/junior high principal (1)
Senior high principal (1)
Representative from each area office (5)
Representatives for the superintendent and deputy (2)
Representatives for each central office Associate Superintendent (3)

2. Determine Approach for Collecting Perceptions and Analysis

The major approaches for collecting perceptions utilized in needs assessment procedures are questionnaires, telephone surveys, face-to-face meetings, or the Delphi technique. The two preferred methods are questionnaires or face-to-face meetings. Telephone surveys and the Delphi technique will not be discussed in this paper. The reader is referred to the MCPS Information Department for procedures on telephone surveys and to The Delphi Method: Techniques and Applications edited by Harold Linstone and Murray Turoff and published by Addison-Wesley Publishing Company for Delphi technique procedures.

Questionnaires are probably the simplest means of collecting perceptions. One of the advantages of using a questionnaire is that more items can be assessed. The Department of Educational Accountability should be contacted, if this method is chosen for use outside one's unit, as such surveys are to be cleared through that office.

If a questionnaire is used, the instrument itself should be coded in some way so it will be possible to collate the responses by category (teacher, student, etc.). A brief letter of explanation should be attached to the questionnaire. The distribution of the instrument could be through the postal office, sent home with children, hand delivered, or completed when a group is together. Return rates, expense, and time are factors to consider.

Documented data summarized for each need should probably be included with the questionnaire so the respondents are more knowledgeable about what they are assessing. Other relevant information like what has been included in the MCPS budget discussion guides might be a part of this package. A judgment on what to provide the participants should be made with respect to the extremes of giving them too much and biasing the outcome or giving them nothing, thus chancing the possibility of polling uninformed opinion.

Face-to-face needs assessments are probably the best technique for collecting perceptions because of the dialogue which can take place. Public hearings, New England type town meetings, or seminars can be used. Public hearings and town meetings, however, often do not provide sufficient structure to pinpoint the public's perceptions on a series of specific needs. Also, they are difficult to document and analyze. A structured seminar has the top potential for producing good results.

The suggested major tasks involved in a structured seminar to assess needs are:

a) Send the needs, related data, and other information to participants prior to the meeting with instructions to familiarize themselves with the material

b) Orient participants at an initial gathering

c) Have individuals rank and rate each need without conferring with one another

d) Arrange for small groups to build a consensus on the ranking of importance

e) Calculate a mathematical consensus* from each small group's consensus (the groups should be the same size or each group's consensus should be multiplied by the number of members and then added together)

f) Determine agreement or alternations with the mathematical consensus by the total group

g) Repeat steps d) through f) regarding the rating of attainment for the needs

h) Compare the rankings of importance and the ratings of attainment

i) Reach consensus on the needs and their relative priority

In actual practice a combination of approaches might be used to collect perceptions. For example, a chamber of commerce report already on hand may indicate some of the chamber's feelings, some nonparents may be surveyed by telephone, parents could receive a questionnaire, and the staff might utilize a seminar. Obviously, such a scattered approach presents some problems in comparing responses and evaluating the reliability and validity.

The analysis can be detailed and complex or very broad and simple. The crudest analysis would be to disregard whether participants were students, teachers, parents, etc., and just add up all the scores for each item. This method is not suggested. What is proposed is that categories such as administrators, teachers, classified staff, parents, nonparents, and students be established. Then the number of participants in each category be reported (the total population of that category might also be valuable information, if known) with their totaled responses and discrepancy values between importance and attainment.

3. Prepare for the Collection of Perceptions

Whatever approach is selected for collecting perceptions, some preparation is required. The needs assessment planner should construct a checklist of what has to be done, who is going to do it, when it will be done, and what resources are required.

4, 5, and 6. Collect, Compare, and Summarize Perceptions

The discussion of the collection, comparison, and summarization of perceptions can most easily be done together, although each is a distinct step during the needs assessment process.

The ranking or importance and rating of attainment for each need can be accomplished on scales like the ones below. If 20 or fewer needs are being assessed, the ranking or importance could be a rank order from 1 (lowest importance) through 20 (highest importance).

---

*Average

Ranking of Importance						Rating of Attainment					
Little Importance	Minor Importance	Medium Importance	Major Importance	Critical Importance		Extremely Poor	Poor	Fair	Good	Excellent	Too Much Is Being Done
(1)	(2)	(3)	(4)	(5)	"Need A"	(1)	(2)	(3)	(4)	(5)	(6)
(1)	(2)	(3)	(4)	(5)	"Need B"	(1)	(2)	(3)	(4)	(5)	(6)

Some need assessment procedures assign weights to the different categories of respondents; for example, a teacher's response may count twice as much as a parent's response. If one were using the results in a research study, such a procedure might be appropriate. However, weighing the responses is not suggested here because of its possible negative effect upon the participants. The totals for each category of respondent could be used if one were interested in differences betwen groups; the information is available by looking at the totals for each category.

One popular method for comparing perceptions of importance and attainment and summarizing the data is given below. MCPS planners should feel free to use other methods for analysis, although a summary of the data should be in a chart or table format.

Instructions for Comparative Analysis (optional)

1. Separate responses by the various participating groups. For example, all of the responses by students should be tallied independently of other groups. Each group should be compiled on a separate worksheet (see next page).

2. The worksheet on the next page is constructed so that each participant is indicated on a row. "I" represents importance while "A" stands for attainment. The score given each item (see previous section on page 22) by the participant should be recorded.

3. When all of the responses have been recorded, each column should be totaled.

Category _____

SAMPLE WORKSHEET

TOTAL POPULATION_____ NUMBER OF PARTICIPANTS ___

ITEM NUMBER

Respondent Number	1		2		3		4		5		6		7		8		9		10		11		12		13		14		15	
	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A	I	A
1																														
2																														
3																														
4																														
5																														
6																														
7																														
8																														
9																														
10																														
11																														
12																														
13																														
14																														
15																														
TOTAL																														
QUOTIENT																														
DISCREPANCY																														

4. Each total should be divided by the number of participants with each quotient being placed in the appropriate row marked quotient.

5. The quotient under column A should be subtracted from the quotient under column I for each item. The difference is the discrepancy value for that need given by that group.

6. The needs can be prioritized by the size of the discrepancy value from largest to the smallest. The larger the discrepancy value, the higher the priority according to that group.

7. The discrepancy values for each group should be compared. A simple summary chart should be constructed for each need and recorded on the "Indication of Need" form.

Need: _____

RESPONDENT CATEGORY	NUMBER PARTICIPATING	DISCREPANCY VALUE
Students		
Teachers		
Supportive Staff		
Administrators		
Parents		
Nonparents		
Representatives from School-Affiliated Groups		
Representatives of Various Organizations		

7. Reach Consensus On Needs and Their Relative Order of Priority (Optional)

As was indicated above, a mathematical priority of needs can be reached using perceived opinions. However, some of the documented information on needs may be different from perceived data. Therefore, it seems a good idea to finalize the priority of needs using both.

It is suggested that the person planning (or doing) the needs assessment involve others to establish a consensus on the needs and their relative priority. However, this step is given as optional because a planner may have only utilized documented data for his or her assessment; therefore, a group would have to be formed for reaching a consensus, and this may not be necessary. If a questionnaire was used to obtain the community's perceptions, one might wish to convene a session to reach consensus on the priority of needs. A planner may desire to arrive at the relative priority of needs either with a small group or by him- or herself.

The priority of needs is determined by a rank order listing from the number one need through the least important need. A consensus of opinion may not be possible, but should be sought. If discussion does not produce a consensus, a simple voting or tallying can be used.

Step 8 - Prioritize Needs and Select Needs to Pursue

Analyzing the collected data and determining the order of priority is the most important single step of needs assessment. Whether completed by one person or a group, it brings to bear the judgment of what needs are most critical to resolve. The end product is a listing of the needs in rank order.

The supply of resources in MCPS is limited or even dwindling; therefore, all of the needs identified cannot likely be addressed. By focusing efforts on a few of the most prevalent needs, it is expected that they can be satisfactorily resolved. Selecting some needs as targets upon which to concentrate eases the pressure of "trying to do everything and accomplishing little" or "spreading oneself too thin."

Step 8 A and B may have been completed in Step 7 B and need not be repeated.

Step 8 C. Select Some of The Highest Priority Needs as Targets to Resolve

Using the prioritized needs, the planner(s) must decide which of the needs he or she can reasonably expect to achieve. The highest priority needs should be targeted unless there is a very strong reason for targeting a need with a low priority. One such reason might be that insufficient resources are available to meet a high priority need. It is usually better to postpone putting a high priority need on a shelf for this reason until one has considered a reallocation of resources or has been turned down on a request for resources. After reexamining the way one is using resources now and once the budget is completed, the needs selected as targets may have to be modified. However, it seems that a planner should target and attack the highest priority needs and explore a variety of remedies before tabling them.

No magic figure can be applied when making a decision on how many needs to target. Most enterprises select between five and ten; but such a judgment depends upon capabilities, energies, creativity, resources, the nature of the needs, etc.

Step 8 D. Complete Indication of Need for Each Targeted Need

The collection of forms (see appendix) used to communicate the indication of needs may not require any attention. However, it is a good idea to give it a thorough going over, for it is this document which contains the justification for each need. This document will be what others use for approving, accepting, or rejecting the targeted needs and their relative priority.

Step 9 - Establish Tentative Objectives With Standards

The development of objectives must be done in light of possible constraints for them to be realistic and achievable. Constraints such as lack of funds, student characteristics, changes required in behavior, inadequate facilities, etc., should be considered when writing objectives. Constraints provide friction when planning, however, they should not be viewed as insurmountable obstacles.

The definition of a need used throughout this paper implies some means of measurement for determining what level of achievement will be necessary for resolving the need. Such standards should make it possible to know how well the gap is being closed relative to the targeted needs.

Formulating objectives and setting standards do not require nonsubjective data, such as test scores, dropout statistics, etc. The subjective need described below might emerge from a formal needs assessment as a priority. It illustrates the point that objectives and standards can probably be developed for any need which might emerge. Only two objectives were written for this need, although many others could be developed as a standard against which progress could be measured.

The verified need is that many children do not have a positive attitude towards their school work and often destroy theirs and that of others. An acceptable condition which wis realistic would be for only a few children to demonstrate such negative attitudes.

Tentative Objectives and Standards:

1. Children will take home more of their school work to share with their parents. This objective will be evaluated by the school custodian based upon the amount of school papers found in the trash or on the school grounds. A survey of parents will also be made by teachers three times during the year to determine if the objective is being achieved.

2. Several display tables or bulletin boards will be established around the building for the display of students' work. The length of time between when a display is created and when something is destroyed will be recorded and analyzed for improvement.

Step 9 A. List Constraints and Determine Ways to Modify

Prior to the formulation of objectives, an attempt should be made to identify possible constraints which may block or hinder achievement. The most typical constraint is lack of funds. Other common barriers include a status quo-orientation, insufficient training or competence, poor cooperation, not enough time, etc. A list of constraints relevant to the objective(s) under study should be made.

Within nearly all of the constraints which could be identified, there is some degree of flexibility. A planner should try to determine how the constraints may be modified. For example, perhaps additional time or money can be reallocated from another area. One's creativity is often tapped when attempting to remove or sidestep constraints. Some constraints probably cannot be overcome, therefore it is best to acknowledge the fact and plan accordingly.

Step 9 B. Establish Tentative Objectives With Standards Which When Achieved Will Resolve Targeted Needs

For each of the targeted needs, a standard of achievement should be set. Just as the needs are different, the standards may take various forms. -Standards may be written as performance objectives, in terms of test scores, rating scales, etc. When developing these standards, it is important to base them on a reasonable expectation of student or staff capability and resource availability. A progressively higher standard might be spread over several years. These needs should be resolved when the standards are met.

Step 9 C. Modify the Number of Targeted Needs, If Necessary

The setting of standards may influence the number of needs which are possible to achieve. The planner may consider increasing or decreasing the number of targeted needs based upon the desired standards. Experience is the best guide in deciding whether or not or how to midify the number of targeted needs.

Step 10 - Review the Priorities, Needs, and Objectives With Supervisor

Usually the planner doing the needs assessment must gain approval from his or her supervisor before working on the targeted needs. This is particularly true when budgeted resources are required or effort needs to be reallocated. In some cases a need can be resolved without such approval; nevertheless, it is a good idea to keep one's supervisor informed.

Approval may be easier to obtain than acceptance by staff, students, and the community, if they have not been intimately involved in establishing the targeted needs. Acceptance of the targeted needs as legitimate and worthy of attempts at resolution is required, if the needs are to be met.

Step 10 A. Negotiate Approval of Priorities, Needs and Objectives, If Necessary

Some needs may not have to receive approval as they can be handled locally. The targeted needs and standards may be approved as is without any negotiation. The negotiation would be with one's supervisor and perhaps the staff who will have to meet the standards (if everyone did not participate in establishing them). The intent of negotiating the standards and targeted needs is to reach a mutual agreement. It would not be necessary to negotiate the end product of the needs assessment if the planner's supervisor and staff were architects of the outcome.

Step 10 B. Report Priorities, Needs, and Objectives to Staff, Students, and the Community

The main purpose of disseminating the needs, priorities, and objectives is to inform people of what the organizational priorities are and what the standards are that are being sought. Both planning and achieving the standards are made easier if everyone knows what the expectations are. The dissemination process is more than public relations, although public relations would benefit.

Relationship of the Unit's Needs, Priorities, and Objectives to Other Organizational Units

This paper has described the process any MCPS organizational unit would use when conducting a needs assessment. The relationship between the needs priorities and objectives of each unit and how they are integrated to form the systemwide priorities is detailed in other planning papers. However, there are points in the Comprehensive Planning Process when work which has reached a given stage must be discussed and reconciled with one's supervisor. The administrative team as the systemwide planning team will reconcile and recommend the countywide priorities, needs, and objectives. The Board of Education has ultimate approval for the priorities of the school system.

APPENDIX

What You Have When You Finish A Needs Assessment

Belle Ruth Witkin considers the advantages or products of a needs assessment as being:

1. As a program planner you will discover where the areas of greatest strength and weakness are in respect to student learning, thus laying the basis for more rational curricular planning.

2. You may find revealing discrepancies of various kinds among the perceptions of different groups -- e.g., parents, students, educators, business people -- as to how well the school is performing its job.

3. Unexpected or hidden needs and causes of ongoing or unresolved problems may emerge.

4. The assessment, if addressed to future and long-range needs as well as current ones, will provide for renewal in the school.

5. When needs assessment data are used in conjunction with data on cost/effectiveness and evaluation, you can make more defensible choices among program alternatives. A methodical approach prevents leaping to solutions on the basis of scanty analysis or evidence.

6. Needs assessment should also give you direction for placing priorities on allocating scarce resources.

7. When done successively over two or three years, the assessment will show trends related to increasing, declining, or changing pupil populations.

8. Should you face decreasing public support for education, dropping enrollments, and demands for better performances of high school graduates, a good needs assessment will help you find the causes of the difficulties and set priorities for corrective action. The assessment will either uncover new information, or document and validate policies and programs already in action.

9. Needs assessments will also give you information for planning in special areas, such as education of the handicapped, health and guidance services, career and vocational education, needs of minority language and cultural groups, and multicultural education for all.

10. When you involve the community in the process, you are likely to find more acceptance for the resulting plans and policies than if educators alone assess the needs and make the decisions. Also, when dissident as well as supportive groups are given a voice, and their participation is invited in a constructive fashion, there is a better chance of reaching consensus on the areas of greatest need and on proposals to meet those needs.*

The MCPS Needs Assessment Process will yield a list of needs given in order of priority with some needs targeted and backup information for each need. Sample products follow on the next three pages. Backup data is provided for the first two priorities as examples.

*Belle Ruth Witkin, An Analysis of Needs Assessment Techniques for Educational Planning at State, Intermediate, and District Levels. (Hayward, California: Alameda County Superintendent of Schools, 1975), pp. 18-19.

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MCPS COMPREHENSIVE PLANNING PROCESS

GUIDE FOR PERSONS SUPERVISING PLANNERS

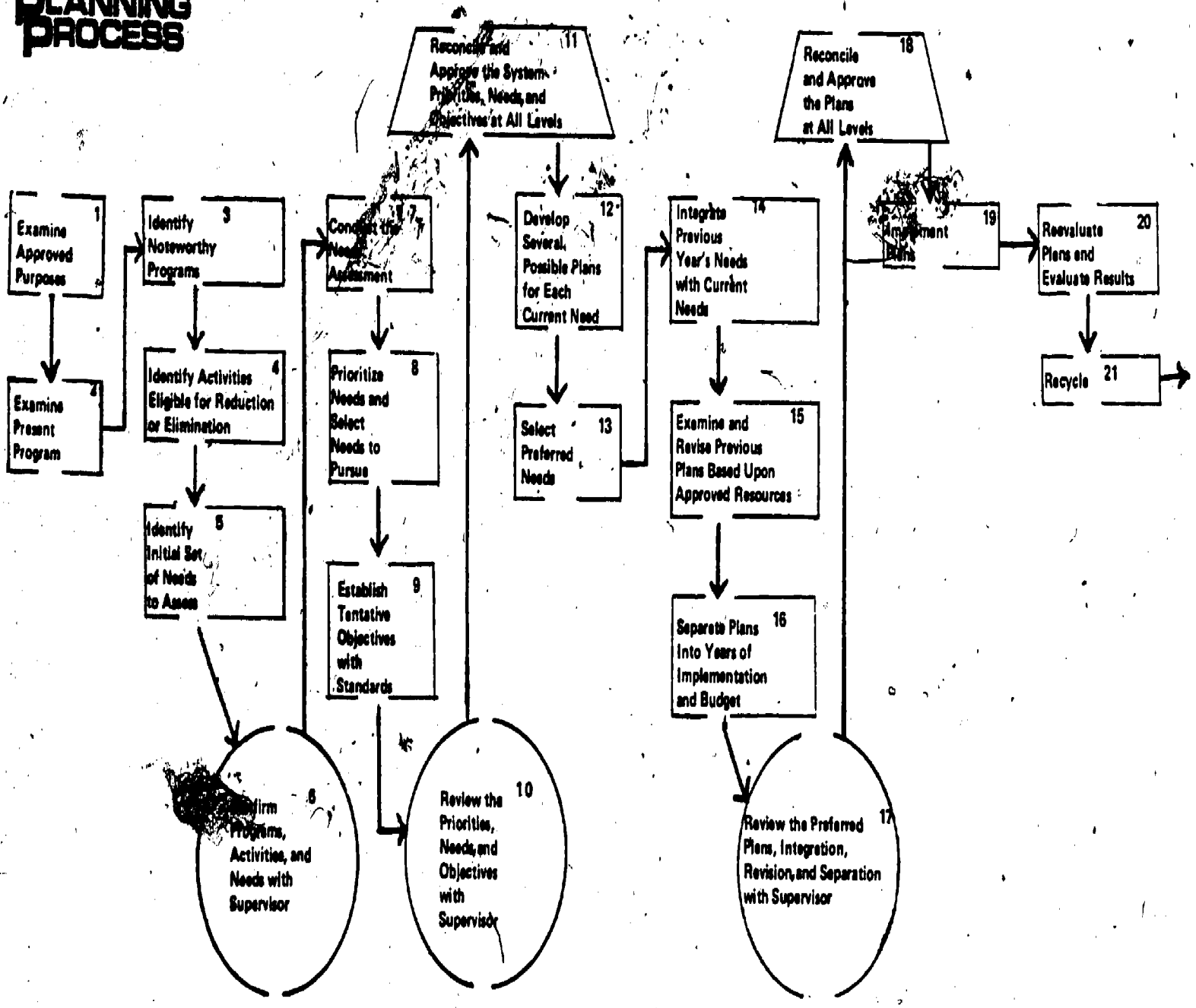
This paper is a brief guide for persons supervising other planners, i.e., area associate superintendents, department directors supervising division directors, etc. The intent of this document is to provide some general assistance concerning the review by supervisors which takes place at certain steps of the MCPS Comprehensive Planning Process. A prerequisite for effective use of this guide is knowledge of the other planning papers (e.g., "Just What is a Need, Anyway?" etc.). These papers refer to this document as the "leadership Guide."

Dr. I. L. Roy Stern, Associate Superintendent for Program Development

Dr. Art Steller, Coordinator for Systemwide Planning

MCPS COMPREHENSIVE PLANNING PROCESS

FLOWCHART



School principals, chief administrators of divisions, departments, or offices, and the Board of Education are being requested to follow the Comprehensive Planning Process in developing their FY 81 plans and budget requests.

The leader of each organizational unit is responsible for working with his/her staff and, perhaps, other stakeholders (parents, students, and community) throughout the process. There are three times in the process when progress is reviewed by and approval to proceed obtained from one's supervisor (does not pertain to the Board of Education). These points, which signify planning interactions which are more intensive and focused than those which go on continuously with the system, are indicated on the above model as a circle. Likewise, on two occasions, within a coordinated and concentrated time period, all of the supervisor-approved work will be reconciled and approved throughout the system. These latter two steps, indicated by trapezoids, establish the interrelatedness of organizational levels and how, for example, a school's priorities influence the Board's priorities and vice versa.

* Steps 3, 4, 12, 14-16 are optional for 1979-80

At three key points in the MCPS Comprehensive Planning Process the individual planner and his/her supervisor* review their progress before proceeding. The planning flow chart indicates these particular steps through the use of circles. The main purpose of the reviews is to gain agreement and approval so the best possible plans will result. It is suggested that the first such review be accomplished in writing, while the next two reviews be done in person. If possible, an existing structure of meetings should be utilized.

Once action plans are created it is assumed that supervisors will periodically discuss their implementation with the planners. A status report has been developed for this reason. It is designed to cut down on the amount of writing required by a planner to keep his/her supervisor informed. Lack of progress or obstacles encountered may influence modifications in actions plans.

A final review during the evaluation phase is suggested, using a format decided on by the participants. The specifics of an evaluation session will depend upon the nature of the action plan's objectives and the actual assessment during implementation. Unachieved objectives may become needs the following year as the planning is recycled.

Supervisors should have a working knowledge of all of the planning papers, (i.e., "Just What is a Need, Anyway?", "1979-80 Guidebook," etc.), as an aid to establishing specific due dates for each step. Of special significance is "The Bottom Line" already distributed to planners which indicates mimimum expectations (see page 3).

Persons supervising planners may adjust procedures and timelines, although such changes should be kept within the major intent of each aspect of the Comprehensive Planning Process. There are key deadlines which must be met (see calendar on page 4) for the entire system to advance on schedule. Therefore, supervisors will need to translate the deadlines for key events into appropriate deadlines for their units. For example, if associate superintendents are to submit priorities to the superintendent by October 5th, the following schedule might be set for the Office of Program Development:

Divisions submit priorities to departments by September 7
Departments review division priorities by September 21
Departments submit priorities to ffice by September 28
Office reviews departments priorities by September 28
Office submits priorities to superintendent on October 5

Supervisors should decide upon specific requirements for their units to best meet their units' interests. For example, some supervisors may want the "Planning Team Record" form submitted at the first review step, they may not wish planners to "Identify Noteworthy Programs," etc.

Supervisors are responsible for performing a quality control function as they review planning efforts. Caution is extended not to be overly critical during the pilot year. This should be a learning venture for "pilot planners."

* The term "supervisor" will be used throughout this paper to indicate one who, at any level, reviews the work of a planner. Thus, a reviewer (supervisor) at one level may become a planner at another.

The emphasis ought to be on content and conceptual understanding, rather than wording. The products of planning will become better as we gain experience. The object should be clarity, not perfection of expression.

After the various intermediate products have been reviewed and approved, another supervisory duty involves coordinating certain aspects of the systemwide reconciliation steps. The two reconciliation steps, represented on the flow chart by trapezoids, establish the interrelatedness of organizational levels and how priorities of a unit influence other units and vice versa. Each area office or other supervisory unit is responsible for collecting the priorities of their subunits and developing some overriding priorities.

THE BOTTOM LINE

A Planner has to....

a) Have a local planning team,
b) Read the 1979-80 Guidebook,
c) Use Steps 1-6 (and substeps and forms) as determined appropriate by the planner's unit,
*d) Complete Steps 7-10, including the use of the form "Indication of Need" for the 3-6 needs selected to pursue,
*e) Select preferred plans (Step 13) and complete appropriate "Action Plan" forms,
f) Review with supervisor (Steps 6, 10, and 17),
g) Implement plans in FY 81 and submit "Status Reports", and
h) Provide feedback to the Office of Program Development, as requested.

A Planner should....

a) Read all of the planning materials, and
b) Use and modify specific aspects of the entire planning process, as appropriate.

The Supervisor of a Planner has to....

a) Read the 1979-80 Guidebook,
b) Determine how to best complete Step 6, including how to use the "Needs to Assess" form,
c) Set deadlines for Steps 6, 10, and 17,
*d) Provide supervision and guidance for other planners,
e) Approve the planning units' products and procedures,
f) Complete "Consolidating Objective" forms for planning units (Step 11) within his/her unit,
g) Review with his/her supervisor (Steps 6, 10, and 17), and
h) Provide feedback to the Office of Program Development, as requested.

The Supervisor of a Planner should....

a) Read all of the planning materials,
b) Engage in the planning process for his/her own unit, and
c) Use and modify specific aspects of the entire planning process, as appropriate.

Reminder: This is a pilot year to improve upon the planning process. Please work through the process as best you can, let the Office of Program Development know what help you desire, and think of what improvements can be made for next year.

*Efforts should be focused upon these steps using the "Indication of Need" and "Action Plan" Forms as a guide.

REVISED SCHEDULE FOR KEY EVENTS*

I.	Sharing of Information	July 31 to August 31
	(a) School principals submit "Needs to Assess" forms to Area Associate Superintendents. Coordinator of Systemwide Planning will collect copies of available "Needs to Assess" or "Indication of Need" forms (plus other information or forms as appropriate)	July 31
	(b) Possible needs collated and distributed to planners	August 3
	(c) Each planner will consider adding or modifying his/her list upon examining needs being looked at by other units	August 3 to August 31
	(d) Central office units submit "Needs to Assess" forms to Associate Superintendent/Executive Assistant	August 6 to August 13
II.	In-service on Action Plans	August 3 to August 31
	(a) "Key Personnel" in-service session on Action Plans	August 3
	(b) "Key Personnel" provide in-service for colleagues	August 3 to August 31
III.	Planning Teams Complete Assessment and Prioritization	By October 5
	(a) Associate Superintendents/Executive Assistant submit priorities to Superintendent or Deputy Superintendent	October 5
	(b) Other planners submit their priorities to meet this schedule	August 31 to September 21
IV.	Reconciliation of Priorities by Administrative Team	October 19
V.	Completion of Action Plans by Planners (A supervisor could set a later date, if these action plans do not directly involve budgetary requests.)	November 1

* Planners should continually move ahead with their own planning with the above dates as deadlines. Hence, a principal may start developing an action plan(s) in the middle of August before all of the priorities have been established. This strategy will enable planners to pace their workload, rather than cramming a lot of activity into a short time period to meet the next deadline.

First Review: Confirm Programs, Activities, and Needs With Supervisor (Step 6)

Deadlines	Dates
Area Associate Superintendents will review schools' "Needs to Assess"	By July 31
Central Office Associate Superintendents and the Executive Assistant will review units' "Needs to Assess"	August 3 - 13
The above administrators will need to set earlier deadlines for schools or departments to submit their "Needs to Assess."	

The supervisor reviews, may revise, and confirms the statements of noteworthy programs, activities to reduce or eliminate, and "needs to assess" which have been forwarded to him or her. The supervisor at this time also gives suggestions, assistance, and direction regarding the material forwarded on how the planner intends to conduct the needs assessment.

This step provides an opportunity for the supervisor to work with the planner before the planner has invested a great deal of effort in the planning.

Besides determining if you agree with the proposed noteworthy program(s) and activities to eliminate or reduce, you should give major attention to the "needs to assess." Of prime importance, is reinforcement of the concept of a need, particularly that resources are not "needs."

General Directions for Planners

(These instructions are given in the 1979-80 Guidebook for this step.)

6.1 Write a brief description answering the questions: How will the needs be assessed? How will staff, students, and the community be involved?

6.2 Confirm the programs, activities, needs, and approach for the needs assessment with your supervisor. (It is suggested that this step be done in writing.)

General Directions for Supervisors

6.1 Determine how to best complete Step 6, (all "paper reviews," conferences with planners, some combinations, etc.) including how to use the "Needs to Assess" form, set timelines and communicate to planners.

6.2 Confirm the programs, activities, needs and needs assessment approach for planners. (It is suggested that this step be done in writing. Questions to use in the review are given below.)

Questions to Elicit Discussion

Identify Noteworthy Programs (Step 3)

1. Why was this program (s) designated as noteworthy?

Identify Activities Eligible for Modification and/or Elimination (Step 4)

1. How was this activity(ies) identified?
2. How have the three considerations on page 4 of the Guidebook been addressed?
3. What is the saving in terms of time? Cost? Other factors?

Identify Initial Set of Needs to Assess (Step 5)

1. How were the needs identified?
2. Does each need demonstrate relevance to the unit's mission?
3. Is each need clearly worded as a "need"?
4. Can these needs be realistically achieved?
5. Do the needs provide a balanced look at the unit?
6. Are the needs few enough to be manageable in an assessment process?
7. How will the needs be assessed? How will staff, students and the community be involved?

Second Review: Review the Priorities, Needs and Objectives with Supervisor (Step 10)

Deadlines

	Dates
Associate Superintendents/Executive Assistant submit priorities to the Superintendent or Deputy Superintendent.	October 5
Other planners submit their priorities to their supervisors to meet this schedule.	

You must approve the priorities, needs, and objectives before the planners proceed. (This step does not apply to the superintendent's or deputy's priorities, needs, and objectives.) Through a two-way negotiation process, you reach agreement using "Indication of Need" forms as a basis for discussion.

General Directions for Planners
(These instructions are given in the 1979-80 Guidebook for this step.)

10.1 Classify the needs by Topic and Category (see front page of School Information Summary) and record on "Indication of Need" forms.

10.2 Submit your list of priorities, needs to pursue, and objectives to your supervisor using MCPS Forms 345-53.

10.3 Negotiate the priorities, needs to pursue, and objectives with your supervisor to reach agreement.

General Directions for Supervisors

10.1 Determine format (i.e., individual conferences, group meetings, in writing unless interview requested, etc.) for reviewing planners' results and set due dates. Communicate these to planners.

10.2 Review the priorities, needs to pursue and objectives with each planner and negotiate to reach agreement. (It is suggested that these reviews not be started until after the supervisor has had an opportunity to examine all of the information from the subunits.)

Questions to Elicit Discussion

1. How was each need assessed? What data was collected and how? What did the data indicate?

2. What group(s) or individuals perceived this as a need? Staff? Parents? Students?

3. How were their perceptions obtained?

4. What is the rank-ordered priority of the needs? How was it determined?

5. How were the "needs to pursue" selected from the priority listing of needs?

6. Are the objectives clearly stated? Is the method of measuring attainment described and is it appropriate?

7. What other units or persons do you think will be impacted or directly involved in meeting each need?

Reconcile and Approve the System Priorities, Needs and Objectives at All Levels (Step 11)

After reviewing each subunits priorities, needs and objectives, the supervisors use this information to develop consolidating objectives for their unit.

Some central office units may elect not to consolidate the priorities of their subunits. The reason for this decision would be eased upon the uniqueness of each subunit. In such an instance, subunits' priorities should be grouped together and reranked as priorities of the larger unit (therefore the unit would simply repeat step 8, modified slightly, and not engage in the consolidating aspects of this step).

The consolidating process will enable the supervisory unit to develop and prioritize overriding objectives encompassing the needs of their individual units. It is important to note that the specificity of objectives and/or needs is greater at the local unit level than at larger organizational unit levels.

The topics and categories listed below are intended to serve as a framework for classifying data and information in a standardized fashion. Central Office organizational units may select topics and categories from those below or develop other categories for organizing their needs. The categories obviously are not exhaustive and you may supplement them with additional categories and information.

TOPIC I: Student-Community Characteristics

Categories:
- Enrollment and Attendance
- Test Data
- Handicapped and Other Special Needs
- Student Behavior/School Climate
- School Community Relations
- Community Demographics

TOPIC II: Administration and Organization

Categories:
- Administrative Organization
- Food Services
- Safety
- Facilities
- Budget/Other Funds

TOPIC III: Personnel

Categories:
- Staffing
- Staff Development/In-Service

TOPIC IV: Program

Categories:
- Instructional Approach
  - Art
  - Business Education
  - Career Education
  - Cooperative Vocational Education
  - Driver Education
  - English Language Arts
  - Foreign Language Arts
  - Health Education
  - Home Economics
  - Industrial Education
  - Mathematics
  - Multidisciplinary Programs
  - Music
  - Physical Education
  - Science
  - Social Studies
  - Handicapped and Other Special Needs
- Instructional Equipment
- Extra-Curricular

General Directions for Supervisors on Consolidating Objectives

1. Group each of the needs of individual local units according to the above topics and, as appropriate, categories, and indicate on MCPS Forms 345-54: Consolidating objective (next page) (one form for each grouping)
2. Add the needs identified by the supervisory unit to above forms.
3. Analyze and develop overriding objectives for appropriate groupings.
4. Rank order the overriding objectives from the number one need through the least important. Add necessary information to the "Consolidating Objective" forms.
5. Send the "Consolidating Objective" forms to the next supervisory unit, (if any).

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

CONSOLIDATING OBJECTIVE

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 11

Office/Department	Area

Consolidating Objective:	PRIORITY No.___of___
	Topic _____
	Category _____

List the name of each unit which has needs addressed by this consolidating objective and the priority assigned to each need. Attach corresponding MCPS Forms 345-53 which were completed by the units for those needs.

Unit Name	Priority Assigned

☐ Check here if additional units with need priorities are listed on the reverse side.

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature Title Date

General Direction for Supervisors on Reconciling

This step involves the associate superintendents, the executive assistant, the deputy superintendent, the superintendent, the administrative team and other persons who may be requested by these individuals to participate.

Each of the associate superintendents and the executive assistant have a list of priorities which have been reviewed by the superintendent or the deputy. These priorities are a combination of the collection of priorities of their subunits and those identified by their own office staff.

A reconciliation must take place to eliminate potential conflicts of priorities, to reduce troublesome impacts of one unit upon another, to identify areas of mutual interest and support, and to secure concurrence and commitment.

1. Distribute copies of priorities, and backup documentation to other associate superintendents, the executive assistant, the superintendent, the deputy and other members of the administrative team.

2. Analyze the information from the other sources considering your own priorities and the considerations given above.

3. Attend a meeting of the administrative team for the purpose of (a) eliminating potential conflicts of priorities, (b) reducing troublesome impacts of one unit upon another and (c) identifying areas of mutual interest and support. (some of these matters may have been worked out prior to the meeting. Each individual should have some time to give a presentation on the priorities of his/her office.)

4. Prepare the reconciled priorities for ranking by the administrative team.

General Directions for Approving Systemwide Priorities

1. Administrative team members will be provided with packets containing the combined reconciled priorities and backup information.

2. Following a question and answer session, each administrative team member will rate each item on a scale from one (high consideration) to five (low consideration).

3. The individual ratings will be tallied and averaged to derive those priorities receiving most support for highest consideration. A simple chart, such as the one below, will be used to record and communicate the results.

	1	2	3	4	5	Total	Average
Item							

4. The derived priorities will be available to the administrative team for discussion and possible modification before being declared the system's priorities. (It is suggested that approximately 10 priorities be considered system priorities. Items not included in the "Top Ten" could still be considered by the appropriate unit.)

5. The system priorities will be shared with the Board of Education and the MCPS community including staff to indicate our overall direction for FY 81.

Third Review: Review the Preferred Plans, Integration Revision, and Separation of Plans with Supervisor (Step 17)

Deadlines	Dates
Associate Superintendents and the Executive Assistant should review the action plans of schools or departments which directly involve budgetary requests by this date. A later date may be set for reviewing other action plans.	November 1

"Preferred Plans" are simply the plans selected for development after investigating some alternative ways of meeting needs. The preferred plans, integration, revision, and separation must be approved before planners should proceed. (This step does not apply to the superintendent or deputy's plans.) Through a two-way negotiation process, agreement is reached using the "Action Plan" forms the integrated priorities, revised plans, and budget forms. For the pilot year, steps 14-16 would not be done, therefore only preferred plans and budget requests need be reviewed. Ideally, plans and budget requests would be considered concurrently, if possible.

The MCPS Form 345-55A: Action Plan should be used to record the major preferred plans. Guidelines for deciding whether an Action Plan form should be used are: (a) If either the planner or the supervisor believe it appropriate, (b) If additional resources are being requested beyond the regular allocation, or (c) If the plan itself will significantly impact other units.

Each preferred plan should be submitted in writing, incorporating as many elements included on the action plan forms as papropriate.

General Directions for Planners
(These instructions are given in the 1979-80 Guidebook for this step.)

* 17.1 Submit the material supporting decisions on Steps 13-16 to your supervisor.

* 17.2 Negotiate the preferred plans with supervisor to reach agreement.

* 17.3 Negotiate the integrated priorities and revised plans for FY 80 with supervisor to reach agreement. (Will not be part of the process during the pilot)

* 17.4 Negotiate the budget requests for FY 81 with supervisor to reach agreement.

* Steps 12 and 13-16 will not be used during the 1979-80 pilot year.

General Directions for Supervisors

17.1 Provide, in connection with the three guidelines above, expectations about Action Plans. For example, every planner might be required to develop at least one Action Plan using the forms. Certain planners might be encouraged to use the forms due to the specific nature of their needs.

17.2 Determine if plans and budget requests can be considered at the same time, and set deadlines. Communicate these to planners.

17.3 Review preferred plans (and budget requests) and negotiate with each planner to reach agreement.

Questions to Elicit Discussion

Develop Several Possible Plans for Each Current Need (Step 12)

Select Preferred Plans (Step 13)

Integrate Previous Year's Needs with Current Needs (Step 14)

1. What are the alternative plans (at least two) for meeting each need?
2. Does each alternative plan include:
   a. investigation into advantages & disadvantages
   b. expected results (effectiveness)
   c. impact upon staff and community (time requirements & other demands)
   d. level of staff, student and community acceptance
   e. estimated costs (personal, equipment, materials/supplies, other) for a five-year period
   f. consideration for in-service
   g. proposed funding plan
3. What criteria were used to select the preferred plans?
4. How were previous year's needs integrated with the current list?
5. What is the plan for implementing the preferred alternatives (activities, evaluation, monitoring, timelines)?

Examine and Revise Previous Plans Based Upon Approved Resources (Step 15)

1. Given the approved resources, what revisions are necessary in previous plans? What revisions are necessary in objectives or expectations?
2. How were the revisions determined?

Separate Plans into Years of Implementation and Budget (Step 16)

1. How was the separation determined?

2. If not already indicated, what other units or persons will be impacted or directly involved in the plans (both fiscal years)?

3. How will revisions be communicated to other units or persons affected?

Reconcile and Approve the FY 81 Plans and Budget Request at All Levels (Step 18)

Reconciling the plans of all units systemwide will ultimately move forward on two levels*: (1) revisions in FY 80 plans and (2) FY 81 budget requests. Revisions in FY 80 plans need only be communicated to others affected by the changes so their plans can be adjusted accordingly. (For example, the Department of Instructional Planning and Development revises the FY 80 plans for implementation of an instructional program and notifies school-based personnel who were to have been involved.) The approval for FY 81 plans simply goes "up the ladder" from supervisor-to-supervisor. Each planner secures approval from his/her supervisor. FY 81 budget requests follow the budget development timetable.

The associate superintendents, the executive assistant, the deputy superintendent and the superintendent are responsible for coordinating plans and budget requests throughout the system, as they are presently.

* FY 80 plans will not be revised using this process unless considered appropriate by planners and/or supervisors.

April 23, 1979

MCPS COMPREHENSIVE PLANNING PROCESS

1979-80 GUIDEBOOK

Dr. I. L. Roy Stern, Associate
Superintendent for Program Development

Dr. Art Steller, Coordinator of
Systemwide Planning

Introduction

The Comprehensive Planning Process is scheduled for systemwide implementation for FY 81 planning. This spring/summer the process will be piloted by some organizational units for FY 81 planning. As with any pilot project, some modifications of procedures or forms may occur during implementation and, obviously, afterwards.

Participating school principals; other chief administrators of divisions, departments, or offices; and the Board of Education are being requested to follow the comprehensive planning process in developing their FY 81 plans and budget requests. These plans and budget requests should include a distinction between maintenance of ongoing emphases and new thrusts.

More specifically, a set of steps is involved starting with the examination of approved purposes ("what should be") and present programs ("what is"). Then needs (gaps between "what should be" and "what is") are assessed, priorities are set, plans are created, and budgets are established. The directions, steps, and forms provided in this document have been designed for guidance to the planner. Some of the steps and corresponding forms are optional. The forms have been designed to minimize the amount of writing, while maximizing the clarity both to the planner and readers. The forms will also aid in moving the priorities and plans through the system. The final step is a recycling of the process.

There are three times in the process when progress is reviewed by and approval to proceed obtained from one's supervisory (does not pertain to the Board of Education). Supervisors are responsible for performing a quality control function as they review planning efforts. Likewise, on two occasions, within a coordinated and concentrated time period, all of the supervisor-approved work will be reconciled and approved throughout the system. These latter two steps establish the interrelatedness of organizational levels and how, for example, a school's priorities influence the Board's priorities and vice versa.

Local Planning Team

It is suggested that the administrator in charge of each organizational unit utilize an existing coordinating group, such as a steering committee or coordinating council, as a local planning team. Besides the planner, a local planning team would include representatives from its own members, units it supervises or coordinates, other units with whom it interacts, and, perhaps, the community. For example, a school planning team could consist of the principal, some classroom teachers, other staff, parents, other citizens, and, perhaps, students. Central office units who service other MCPS units should consider including such "clients" on their planning teams or obtaining feedback through a liaison system.

Documentation of the planning team participation is desirable. MCPS Form 345-50: Planning Team Record is for recording involvement of the planning team. It can be used as a working draft during the planning process. As such, membership on the planning team and members' affiliations can be listed prior to Step 1. The form may be updated as the involvement of each team member is planned and completed. This record of involvement in the planning process is submitted to the supervisor only if requested.

Suggested Materials

These materials should aid planning, and it is recommended that they be collected by each planner prior to starting the process:

a) The MCPS Comprehensive Planning Process: A Conceptual Overview

b) MCPS Goals of Education, Program of Studies, Board policies, state and federal guidelines, mission statements, other existing goals and objectives, etc., which provide affirmations of approved purposes ("what should be").

c) Data describing the present program ("what is") including school information summary, the annual test report, the capital budget for FY 80, approved resources for FY 80, etc. (See "Supplement to School Information Summary.")

d) Other planning support materials, such as the paper entitled "Just What Is a Need, Anyway?"

e) Available information from other appropriate organizational units indicating their current state of thinking regarding major thrusts for FY 81 or long-range plans.

Montgomery County Public Schools

MCPS COMPREHENSIVE PLANNING PROCESS

STAGES AND STEPS*

Stage I - EXAMINE APPROVED PURPOSES/PRESENT PROGRAM

1. Examine Approved Purposes
2. Examine Present Program

Stage II - IDENTIFY NOTEWORTHY PROGRAMS/ACTIVITIES TO ELIMINATE/NEEDS TO ASSESS

3. Identify Noteworthy Programs
4. Identify Activities Eligible for Reduction or Elimination
5. Identify Initial Set of Needs to Assess
6. Confirm Programs, Activities, and Needs with Supervisor

Stage III - ASSESS/PRIORITIZE NEEDS AND ESTABLISH OBJECTIVES

7. Conduct the Needs Assessment
8. Prioritize Needs and Select Needs to Pursue
9. Establish Tentative Objectives with Standards
10. Review the Priorities, Needs, and Objectives with Supervisor
11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels

Stage IV - DEVELOP ACTION PLANS/BUDGET REQUESTS

12. Develop Several Possible Plans for Each Current Need
13. Select Preferred Plans
14. Integrate Previous Year's Needs with Current Needs
15. Examine and Revise Previous Plans Based Upon Approved Resources
16. Separate Plans Into Years of Implementation and Budget
17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor
18. Reconcile and Approve Plans and FY 81 Budget Requests at All Levels

Stage V - IMPLEMENT PLANS

19. Implement Plans

Stage VI - EVALUATE/RECYCLE

20. Reevaluate Plans and Evaluate Results
21. Recycle

*Steps 3, 4, 12, 14-16 are optional for 1979-80.

1. Examine Approved Purposes

Planning occurs within a context defined by the society at large and the Montgomery County school community. The MCPS Goals of Education, Program of Studies, Board policies, state and federal guidelines, mission statements, other existing goals and objectives, etc., constitute the approved purposes ("what should be") of MCPS. The local planning team needs to consider these "givens."

Directions

1.1 Identify and examine major changes in approved purposes (or procedures) which significantly influence your planning. (For example, increased funding for textbooks which has implications for instruction.)

1.2 Collect and analyze available information from other organizational units indicating their current state of thinking regarding major known thrusts for FY 81 or long-range plans.

1.3 Determine the effect upon your planning (and, if applicable, upon the planning of other units.)

1.4 Identify, clarify, and formalize (to the extent necessary) the interdependence or liaison relationship between your unit and other units or persons.

1.5 Disseminate findings to all concerned individuals or groups.

2. Examine Present Program

The present program ("what is") is the foundation upon which planning and future actions are built. The local planning team should evaluate the accomplishments (or lack thereof) relative to 1978-79 goals and objectives and other pertinent evaluation information. A school information summary* which consists of a set of categories to serve as a framework for classifying data (and needs, priorities, objectives, resources, and cost estimates) has been developed. Schools have been supplied with standardized data, i.e., test scores, enrollment data, etc., as part of their summaries. Other units should generate data appropriate to their unique characteristics.

Directions

2.1 Complete and/or analyze your unit's information summary.

2.2 Secure and examine other relevant information describing your present program, especially evaluation information.

2.3 Report relevant findings to all concerned individuals and groups (i.e., annual school report to community).

*Separate paper

3. Identify Noteworthy Programs

Recognition should be extended for special programs. By identifying outstanding programs and sharing this information throughout MCPS, everyone will benefit. The public, as well, should be aware of noteworthy projects. This step can be expanded to the identification of exemplary programs outside MCPS. Research and promising theories may also be considered at this point. In addition, the general strengths of each program should be known. Organizations improve themselves by building upon strengths.

Directions

3.1 Identify your noteworthy programs or strategies and general strengths of your programs.

3.2 Confirm your proposed noteworthy program(s) by requesting your supervisor and/or other MCPS staff member in a related area to visit.

3.3 Provide your supervisor with completed MCPS Form 345-51: Noteworthy Program Description.

3.4 Determine what other exemplary programs research and/or promising theories you may consider including in your plans.

4. Identify Activities Eligible for Modification or Elimination

A major problem faced by MCPS is deciding what not to do. All needs cannot be met. An activity eligible for reduced effort or modification can be considered a "positive discrepancy" between "what is" and "what should be." In other words, more is being done in this area than ought to be. Efforts expended towards a limited number of goals must be conducted in the most efficient and effective manner possible. In some areas it may be possible to reduce the attention given, while other areas, programs, or activities may be eliminated without a significant loss of productivity. In some cases, the scope of such an activity may be such that a planner can eliminate it without notifying his or her supervisor. It may be necessary to gain acceptance from a supervisor before reducing emphasis. If the activity being considered for reduced attention is of major significance, the planner should include it as an item to assess and follow-up by completing appropriate forms. Four considerations can be used when deciding upon areas in which to reduce effort or eliminate entirely. They are:

a) Does the original need still exist? If so, can a reduced means or lessened amount of attention satisfy the need?

b) Have you exceeded the standard of "what should be" or are you doing more than has to be done? (Do you have a positive discrepancy between "what is" and "what should be?") Have you reached the point of diminishing returns?

c) Has the relative priority or importance of the activity shifted towards being less of a priority or of lower importance? If so, can reduced resources or a lessened amount of attention satisfy the need?

d) Is the activity under consideration more concerned with maintenance and enhancement of internal operations than service to clients? If so, is it possible to eliminate efforts in this area or can reduced resources or a lessened amount of attention satisfy the need?

Directions

4.1 Identify some activities which may be terminated or receive less attention.

4.2 Obtain feedback from appropriate persons and select items to eliminate or modify.

4.3 Consider including these activities, if of major significance, in your initial set of needs to assess (Step 5).

4.4 Provide your supervisor with completed MCPS Form 345-52: Needs to Assess as appropriate (after Step 5).

5. Identify Initial Set of Needs to Assess

A need is defined as the discrepancy between "what is" and "what should be." It is important to realize the "what should be" represents an acceptable condition - not necessarily an ideal state.

Goals (or objectives), programs, or resources are often confused with needs. A goal or objective is an example of "what should be." Therefore, a need exists when a goal is not being met. A program is the prescribed treatment to meet a need. Resources (time, money, books, people, etc.) are what a program requires to function and do not constitute a need. For example, the MCPS approved formulas for resource allocations (such as the one for textbooks), even if unfulfilled, do not identify "needs." Even though resources are necessary and unmet allocation formulas may be used as part of a rationale for the resources, they are not "needs." Needs are expressed as gaps between expected results and the present reality. Within these parameters, you can identify your needs very broadly or very specifically.

The universe of needs simply cannot be addressed. Therefore, focusing attention upon the needs deemed the most critical or important is required. This identification of exceptions from acceptable norms is the first formal procedure for screening your needs down to a manageable number.

Directions

5.1 Identify negative discrepancies (needs) between the approved purposes and the present program (use unit information summary with other data).

5.2 Scan the results of Step 4.3, long-range and existing lists of needs for relevant items.

5.3 Confirm the relevance of each need to your mission and alert other units of possible needs that fall within their responsibility.

5.4 Finalize these preliminary needs statements by wording for clarity, determining those which realistically can be achieved, analyzing their range, and reducing the total to a manageable number. List these on MCPS Form 345-52: Needs to Assess.

NOTE: Central office units wait to finalize their needs to assess until the other levels have completed Step 7.3.

6. Confirm Programs, Activities, and Needs with Supervisor

The noteworthy programs, activities to reduce or eliminate, and initial set of needs are to be submitted to your supervisor for confirmation. Also, you should know and share how you plan to conduct your needs assessment.

Directions

6.1 Write a brief description answering the questions: How will the needs be assessed? How will staff, students, and the community be involved?

6.2 Confirm the programs, activities, needs, and approach for the needs assessment with your supervisor. (It is suggested that this step be done in writing.)

7. Conduct the Needs Assessment

(A supplemental planning paper describing a process for needs assessments in MCPS is available for more specific guidance.)

A needs assessment, broadly conceived, is a collection of information on needs which is subsequently analyzed. A wealth of data is available to MCPS planners. For this purpose, previously compiled data should be examined as a first step in verifying a need. Many of the needs in MCPS have already been outlined through various examinations or studies. It is conceivable that sufficient information is already on hand to substantiate or refute a particular need without further assessment. If this is the case, it seems unnecessary to harvest additional data to reconfirm a need.

For each need being assessed, all of the available sources of relevant documentation should be collected and reviewed. If at all possible, several different kinds of information should be secured for each need.

The documentation which has been collected for each need should be concisely summarized. The wording should be written for easy assimilation and interpretation by persons unfamiliar with the original sources. Names, dates, numbers, etc., should be recorded on MCPS Form 345-53: Indication of Need. Information both confirming or refuting each need must be provided for accurate evaluation. Besides aiding the analysis of the information, the condensed data can be used when discussing needs with decision makers or the public.

Directions

7.1 Collect, analyze, and record existing documentation confirming or refuting each need on MCPS Form 345-53: Indication of Need.

7.2 Obtain feedback on the needs from appropriate individuals or groups:
- a) Your Unit's Staff
- b) Other Staff
- c) Students
- d) Local PTA
- e) Community Advisory Groups
- f) Others as Appropriate

7.3 Refine the statements of need based upon the above data. [Include feedback data (Step 7.2) on Form 345-53.]

NOTE: The more complete and accurate the collection of perceptions in 7.2 are, the greater the likelihood of receiving corresponding resources to meet your needs.

8. Prioritize Needs and Select Needs to Pursue

Analyzing the collected data and determining the order of priority in relation to your overall mission is the most important single step of a needs assessment. Whether completed by one person or a group, it brings to bear the judgment of what needs are most critical to resolve. It is suggested that the person planning (or doing) the needs assessment involve others to establish a consensus on the needs and their relative priority. In any case, the establishment of priorities should not necessarily be interpreted as ordering needs according to "the greatest good for the greatest number," i.e., a need for minority or handicapped students may have a higher priority than a need relative to a larger portion of the student body.

The priority of needs is determined by a rank order listing from the number one need through the least important.

Resources in MCPS, as in any organization, are limited; therefore, all of the needs identified and verified cannot likely be addressed. By focusing efforts on a few of the most prevalent needs, it is expected that they can be satisfactorily resolved. Selecting some needs as targets upon which to concentrate eases the pressure of "trying to do everything and accomplishing little" or "spreading oneself too thin."

Directions

8.1 Using the needs verified by the needs assessment, rank order them from the number one need through the least important.

8.2 Using the prioritized needs, select those needs to pursue in terms of implementation and/or budget requests. (Add information from 8.1 and 8.2 to MCPS Form 345-53 only for those needs you have selected to pursue.)

9. Establish Tentative Objectives with Standards

The definition of a need implies some means of measurement or determining what level of achievement will be necessary for resolving the need. Such standards should make it possible to know how well the gap is being closed relative to the targeted needs. Objectives should first be written for the desired results at the end of FY 81 (this could include objectives for FY 80). A progressively higher standard of achievement for the same objective might be extended over a period of years. Objectives are to be added to the "Indication of Need" forms.

Directions

9.1 List constraints and determine how or if the constraints can be modified.

9.2 Using previously established objectives, your mission, current needs, and constraints, formulate the objectives describing desired results at the end of FY 81. (Add objectives to MCPS Form 345-53.)

10. Review the Priorities, Needs, and Objectives with Supervisor

Supervisors must approve the priorities, needs, and objectives before one should proceed. This step does not apply to the Board of Education or the superintendent/deputy's priorities, needs, and objectives. Through a two-way negotiation process, agreement is reached using "Indication of Need" forms as a basis for discussion.

Directions

10.1 Classify the needs by Topic and Category (see front page of School Information Summary) and record on "Indication of Need" froms.

10.2 Submit your list of priorities, needs to pursue, and objectives to your supervisor using MCPS Forms 345-53.

10.3 Negotiate the priorities, needs to pursue, and objectives with your supervisor (after he/she has received all of the information from the subunits) to reach agreement.

11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels

Offices and departments have used MCPS Form 345-54 (also see "Leadership Guide") to collect, analyze, and develop consolidating objectives from the priorities of their subunits. Each of the associate superintendents, the superintendent/deputy, and the Board of Education now have a list of priorities, needs to pursue, and objectives which are a combination of a collection of these items compiled from their subunits and their own particular office. A reconciliation must take place to eliminate potential conflicts and to secure concurrence among units impacted by another unit's priorities. It is the Board that will ultimately approve the systemwide priorities, needs to pursue, and objectives.

Directions

11.1 Distribute copies of priorities, needs to pursue, objectives, and backup documentation to other associate superintendents, the superintendent and the deputy.

11.2 Analyze the information from the other sources considering your own priorities.

11.3 Meet to reconcile and approve the system priorities, needs to pursue, and objectives at all levels.

11.4 Approve the systemwide priorities (Board of Education).

NOTE: The associate superintendents, the superintendent/deputy, and the Board of Education may involve some other persons in the completion of this step. However, all planners will need to review the product of this step. A planner may alter his or her priorities based upon the systemwide priorities, as approved by the Board of Education.

12. Develop Several Possible Plans for Each Current Need

After receiving the approved priorities, needs, and objectives, the local planning team should begin deliberations on alternative ways of achieving the objectives. The extent and detail of the alternatives will depend upon the nature of the objective(s) and the corresponding needs. Minor modifications in existing programs may satisfy a given need or it may require new programs, additional staffing, etc. The former may necessitate a plan of a couple of sentences, while the latter may involve several pages as explanation. When developing alternatives, some factors to consider are (a) organizational patterns, (b) staffing requirements, (c) in-service, (d) equipment and materials, (e) instructional strategies, and (f) relationship to present program.

Directions

12.1 Generate several possible plans for meeting each priority and identify those with the best potential for being cost-effective.

12.2 Investigate those plans with the best potential. The MCPS Form 345-55A: Action Plan can be used for examining major alternatives.

13. Select Preferred Plans

From the possible plans generated for each need, select a preferred plan. The preferred plan should demonstrate to your supervisor that it will achieve the objectives in a cost-effective manner. A form has been provided to obtain approval for the preferred plans and for possible incorporation in the budget. As part of the "Action Plan," each objective needs to be divided into segments which will lead to the achievement of the objective. These segments constitute events or activities and are called milestones. The anticipated starting and completion dates of the milestones should be scheduled upon the "Action Plan" form.

Directions.

13.1 Using the best available data, select a preferred plan for each priority.

13.2 Divide each objective into component milestones, schedule the milestones and assign responsibilities accordingly.

13.3 Complete an "Action Plan" form for each preferred plan, if not already completed.

13.4 Communicate the results of 13.3 to appropriate advisory groups for their examination and feedback.

14. Integrate Previous Year's Needs with Current Needs*

Some of the needs identified in the previous year (and included in the budget) may be less important than the current needs. Routine activities and functions necessary to maintain the ongoing events of your unit (also included in the budget) have to be considered as well. Both sets of needs and the routines should be integrated into one list of relative priority. (Steps 14-17 do not pertain to the Board of Education.)

*Steps 14, 15, and 16 are not necessary during the 1979-80 use of this process. It is suggested that planners read these steps to grasp more fully the planning relationship of one year to the next. However, unless a new critical need surfaces which must be incorporated into FY 80 plans, planners should take no actions with respect to planning when reference is made herein to FY 80.

Directions

14.1 Gather the needs and your mission identified in the previous year, current needs, and major routine activities and functions.

14.2 Integrate items in 14.1 into a single rank ordered list of relative priority.

15. Examine and Revise Previous Plans Based Upon Approved Resources*

Once the FY 80 budget is finalized and funds are approved, the previous plans built upon the approval of particular resources will probably have to be revised. Additionally, as a result of Step 14 some of the previous needs (plans) may be revised to meet more critical current needs.

Directions

15.1 Examine approved resources and compare to requested resources.

15.2 Revise previous plans by eliminating parts of the plan or adjusting expected results.

15.3 Allocate approved resources, based upon the priority established in 14.2, until all available funds are exhausted.

16. Separate Plans Into Years of Implementation and Budget*

The revision of plans in Step 15 leads into a formal separation of the plans into those for the upcoming year of implementation or for the FY 81 budget year. The plans marked for FY 81 should be incorporated by supervisors into the budget format, if approved.

Directions

16.1 Using the results of 15.3, priorities for which resources are not available become FY 81 budget requests and should be incorporated into the budget format.

16.2 Add those major routines-ongoing activities and plans for current needs, which will require financial resources in FY 81, to your budget requests.

16.3 Separate plans for the upcoming year of implementation from FY 81 budget requests.

*Steps 14, 15, and 16 are not necessary during the 1979-80 use of this process. It is suggested that planners read these steps to grasp more fully the planning relationship of one year to the next. However, unless a new critical need surfaces which must be incorporated into FY 80 plans, planners should take no actions with respect to planning when reference is made herein to FY 80.

17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor

Supervisors must approve the preferred plans, integration, revision, and separation before one should proceed. This step does not apply to the Board of Education or the superintendent/deputy's plans. Through a two-way negotiation process, agreement is reached using the "Action Plan" forms the integrated priorities, revised plans, and budget forms.

Directions

17.1 Submit the material supporting decisions on Steps 13-16 to your supervisor.

17.2 Negotiate the preferred plans with supervisor to reach agreement.

17.3 Negotiate the integrated priorities and revised plans for FY 80 with supervisor to reach agreement.

17.4 Negotiate the budget requests for FY 81 with supervisor to reach agreement.

18. Reconcile and Approve the FY 81 Plans and Budget Requests at All Levels

Reconciling the plans of all units systemwide moves forward on two levels: revisions in FY 80 plans and FY 81 budget requests. Revisions in FY 80 plans need only be communicated to others affected by the changes so their plans can be adjusted accordingly. (For example, the Department of Instructional Planning and Development revises the FY 80 plans for implementation of an instructional program and notifies school-based personnel who were to have been involved.) The reconciliation for FY 81 proceeds in much the same manner as Step 11. Then FY 81 budget requests follow the budget development timetable for approval.

Directions

18.1 Communicate revisions in FY 80 plans to appropriate persons.

18.2 Distribute copies of priorities, objectives, preferred plans, and FY 81 budget requests.

18.3 Analyze the information from the other sources considering your own plans.

18.4 Meet to reconcile and approve the system plans and budget requests.

18.5 Follow the procedures and timelines for FY 81 budget development.

NOTE: Each of the associate superintendents, the superintendent/deputy, and the Board of Education will engage in 18.2-18.5, although others may be involved, as appropriate. However, all planners will need to review the product of this step.

19. Implement Plans

Each objective included in the FY 80 plans should be divided into segments which will lead to the achievement of the objective. These segments are called milestones and require the scheduling of their proposed completion dates. Some aspects of schedules will need to be coordinated to eliminate potential conflicts. Plans are then implemented and reported according to their schedules. Once FY 81 plans can be finalized (May/June 1980, after resources are known), the milestones tentatively scheduled must be reexamined to determine their appropriateness.

Directions

19.1 Divide each FY 80 objective into component milestones.

19.2 Scheduling milestones, coordinating dates with appropriate persons.

20. Reevaluate Plans and Evaluate Results

The implementation of plans should be continually assessed and monitored. In addition, periodic status reports are to be submitted to one's supervisor. The objectives should serve as the mainstay of the evaluation of results.

Directions

20.1 Submit quarterly (or another time period, agreed upon with your supervisor) status reports for each major plan, using the "Status Report" form to supervisor. If problems occur, a planner may use the same form to alert his or her supervisor at any time.

20.2 Reevaluate plans and evaluate results in cooperation with appropriate persons.

20.3 Communicate final evaluation results to appropriate individuals and groups.

21. Recycle

The entire comprehensive planning process will be recycled based upon evaluation and experience. Objectives unachieved, by definition, become needs for FY 81 or 82, although some other needs may emerge as a higher priority.

Directions

21.1 Use the final evaluation and experience for recycling the process.

MCPS
COMPREHENSIVE
PLANNING
PROCESS

School/Office/Department/Division/Unit	Area

STAGES AND STEPS*

	Date Initiated/Date Completed
Stage I - EXAMINE APPROVED PURPOSES/PRESENT PROGRAM	
1. Examine Approved Purposes	1. ____/____
2. Examine Present Program	2. ____/____
Stage II - IDENTIFY NOTEWORTHY PROGRAMS/ACTIVITIES TO ELIMINATE/NEEDS TO ASSESS	
3. Identify Noteworthy Programs	3. ____/____
4. Identify Activities Eligible for Reduction or Elimination	4. ____/____
5. Identify Initial Set of Needs to Assess	5. ____/____
6. Confirm Programs, Actjvities and Needs with Supervisor	6. ____/____
Stage III - ASSESS/PRIORITIZE NEEDS AND ESTABLISH OBJECTIVES	
7. Conduct the Needs Assessment	7. ____/____
8. Prioritize Needs and Select Needs to Pursue	8. ____/____
9. Establish Tentative Objectives with Standards	9. ____/____
10. Review the Priorities, Needs, and Objectives with Supervisor	10. ____/____
11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels	11. ____/____
Stage IV - DEVELOP ACTION PLANS/BUDGET REQUESTS	
12. Develop Several Possible Plans for Each Current Need	12. ____/____
13. Select Preferred Plans	13. ____/____
14. Integrate Previous Year's Needs with Current Needs	14. ____/____
15. Examine and Revise Previous Plans Based Upon Approved Resources	15. ____/____
16. Separate Plans Into Years of Implementation and Budget	16. ____/____
17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor	17. ____/____
18. Reconcile and Approve Plans and FY 81 Budget Requests at All Levels	18. ____/____
Stage V - IMPLEMENT PLANS	
19. Implement Plans	19. ____/____
Stage VI - EVALUATE/RECYCLE	
20. Reevaluate Plans and Evaluate Results	20. ____/____
21. Recycle	21. ____/____

*Steps 3, 4, 12, 14—16 are optional for 1979-80.

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

PLANNING TEAM RECORD

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Prior to Step 1

*School/Office/Department/Division/Unit	Area

Local Planning Team

Member	Affiliation	Planning Step Involvement	Member Initials

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

MCPS Form 345-50, April 1979

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NOTEWORTHY PROGRAM DESCRIPTION

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensiv nning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 3

School/Office/Department/Division/Unit	Area

1. Program Name	
2. Topic and Category	
3. Program Focus	
4. Date Program Began	(Month, Year)
5. Grade Level(s)	
6. Contact Person	
7. Telephone Number	
8. Major Program Objectives (Student/Client Performance Objectives)	
9. Characteristics of students/clients served by the program	

MCPS Form 345-51, April 1979

10. Procedures/instruments used to identify students/clients . . .	
11. Description of program activities for students/clients	
12. Time (in hours) student/client participates in program weekly .	
13. Program length (term during the school year)	
14. Staffing . .	
15. Student-teacher ratio (if applicable)	
16. Special features/comments . .	

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments: (Include indication of quality):

Signature	Title	Date

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NEEDS TO ASSESS

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 4-6

School/Office/Department/Division/Unit | Area

List each identified need for which you are considering program or administrative changes. This includes needs with either positive or negative differences between "what is" and "what should be," i.e., performance expectations which may result in additions to the program or eliminations of current activities. For each needs statement, list source(s) of information showing an indication of need and an approved purpose. On Side 2 describe the method by which you plan to assess the needs. Use additional sheets as necessary to describe all needs.

A Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

B Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

C Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

D Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

E Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

F. Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

G Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

H Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

Proposed method of assessing needs

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

INDICATION OF NEED

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 6-10

School/Office/Department/Division/Unit

Area

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

Statement of need

PRIORITY
No.___ of___

Topic

Category

Objectives with standards

Approved purpose(s) or rationale

Estimated savings (to be completed only for needs addressing reductions or eliminations.)

a. Number of person days: professional_____; supporting services_____

b. Other:_____

Summary of needs assessment data

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

CONSOLIDATING OBJECTIVE

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 11

Office/Department

Area

Consolidating Objective:

PRIORITY
No.___ of___

Topic

Category

List the name of each unit which has needs addressed by this consolidating objective and the priority assigned to each need. Attach corresponding MCPS Forms 345-53 which were completed by the units for those needs.

Unit Name	Priority Assigned

☐ Check here if additional units with need priorities are listed on the reverse side.

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

MCPS Form 345-54, April 1979

EXPIRATION: DRAFT (4/23/79)

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

ACTION PLAN

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 12-19

School/Office/Department/Division/Unit | Area

Plan Name | Priority No.

Plan Overview

Projected Start Date ___/___ Mo./Yr.

Is in-service training required? ☐ Yes ☐ No If yes, is the in-service plan attached? ☐ Yes ☐ No

Expected Results (Attach MCPS Form 345-53. List objective numbers and restate those objectives that have been revised).

Impact on staff and community (Include how the commitment of staff and community was determined.)

Commitment (Circle one - High = 1, Low = 5): Staff 1 2 3 4 5 ; Community 1 2 3 4 5

Enter the job title for each type responsibility by objective.

Responsibility	Objectives 1	2	3	4
Primary				
Implementation				
Other, (Specify): _____				
_____				

MCPS Form 345-55A, April 1979

Possibilities of nonlocal funding (Explain potential sources, probability of success in acquiring external funding, etc.)

Possibilities of reallocation of existing funds (Explain)

Estimate costs for appropriate fiscal years by budget category for each objective. If it is not possible to separate costs by objective, show costs by objectives combined as appropriate.

	Fiscal Year				
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					

ANALYSIS OF THE PLAN

Advantages	Disadvantages

Other Comments:

Scheduling Milestones for Objective No.(s)_____FY_____. List major events or activities necessary to achieve the objectives; indicate projected event completion dates? and list job titles of persons responsible. Using copies of this page, complete and attach one page for each objective.

Milestones/Events	Months* J	A	S	O	N	D	J	F	M	A	M	J	Responsibilities**
2.													
3.													
4.													
5.													
7.													
8.													

* Show start date as "0" and end date as "Δ". **Show responsibility by job title and code as follows: (1)=Primary (2)=Implementation (3)=Other, (Specify)_____

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments

Signature Title Date

EXPIRATION: DRAFT (4/23/79)

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

ACTION PLAN
ACTIVITIES FOR REDUCTION

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. Attach Form 345-53 for the related need.

Planning Process Reference: Steps 12-19

School/Office/Department/Division/Unit

Area

Activity or Program Name:

Type of Funding: ☐ MCPS ☐ MSDE ☐ Federal ☐ Other (Explain):

Why is this activity selected for reduction or elimination? (Check all that apply.)

- ☐ The program has met its objectives and is ready for termination.
- ☐ The original need no longer exists.
- ☐ Other programs have assumed these responsibilities.
- ☐ The relative priority or importance of this activity has shifted.
- ☐ Other, (Specify)

Explain or comment as appropriate.

Overview of the plan for reduction or elimination. (How will it be accomplished?)

Expected results. (Attach Form 345-53. List the objective numbers and restate any that have been revised. Explain the expected impact of the reduction or elimination on students/clients.)

Expected impact on staff and community of the reduction or elimination. (Indicate the level of commitment to the program or activity and describe how this was determined.)

Staff:

Community:

Commitment (Circle one - High=1, Low=5): Staff: 1 2 3 4 5 ; Community: 1 2 3 4 5

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

STATUS REPORT

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. This report is required quarterly. It may be issued more frequently if desired by the planner or the supervisor.

Planning Process Reference: Step 20

School/Office/Department/Division/Unit | Area

Plan Name

Indicate the status of the plan by checking the appropriate statement and describing any problems that have arisen.

☐ No Problems. All activities within the plan are proceeding on schedule.

☐ Minor Problems. Delays have occurred in reaching milestone(s), but the objective is expected to be accomplished in the planned time frame.
Objective No. ____ Milestone(s) ____
Objective No. ____ Milestone(s) ____

☐ Major Problems. Serious or protracted delays have occurred that threaten accomplishment of the objective within the scheduled time. Explain how much delay is expected.
Objective No. ____ Milestone(s) ____
Objective No. ____ Milestone(s) ____

Problems, actions, and comments:

Planner (Signature) | Title | Date: ____ For: (Circle) Q1, Q2, Q3, Q4 or Other: ____

FOR SUPERVISOR'S USE

Comments:

Signature | Title | Date

MCPS Form 345-56, April 1979

ERIC

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

"ORDER FORM"

INSTRUCTIONS: The items listed below may be ordered for use by planners in the Comprehensive Planning Process pilot by sending a completed form to the Coordinator of Systemwide Planning (Room 250, Educational Services Center). If other assistance or resources are needed or these materials are needed in a hurry, please call (279–3584).

School/Office/Department/Division/Unit	Area

Orientation Aids

_____ Videotape – 45-minute overview (April 18th Presentation – rear of the Cafeteria)
Dr. Stern, Dr. Steller, and Mrs. Morgan
_____ Cassette Tape Number 1 – 15-minute radio interview
Dr. Stern and Dr. Muir
_____ Cassette Tape Number 2 – 45-minute Introduction (April 27, In-Service for Key Personnel)
Dr. Shaffner and Dr. Stern
_____ One Page Summary – major purpose, anticipated results, and products, challenge, and stages/steps.
_____ "A Conceptual Overview"
_____ Summary/Analysis by Consultant
Dr. George Redfern

In-Service Aids

_____ The Bottom Line (minimum requirements for pilot)
(flip side – calendar of key events)
_____ "Getting to Know the Process" ("test")
_____ Answer Key for "Getting to Know the Process"
_____ "Just What Is A Need, Anyway?"
(brief paper answering this question)
_____ Overheads
_____ Sample Forms (forms completed with fictional data)
_____ Set of Bibliographies on Planning
_____ List of Planning Associations/Organizations
_____ Inventory of Periodicals Dealing with Planning
_____ Catalogue of Workshops/Courses on Planning
_____ External Consultants on Educational Planning

Working Papers

_____ "1979-80 Guidebook" (A step-by-step guide for planners to use throughout the process. This is the key document for the individual planner.)
_____ "School Information Summary" (Blank samples of the School Information Summaries provided to planners. Topics and categories are given for classifying needs and data.)
_____ Elementary School
_____ Junior High/Middle School
_____ Senior High School
_____ "Supplement to School Information Summary" (Suggestions of some additional data elements a planner might wish to use.)
_____ "MCPS Needs Assessment Process" (This paper goes into detail about how to conduct a needs assessment.)
_____ "Leadership Guide" (A brief paper to help persons supervising planners.)
_____ Board of Education Priority Setting (Proposed method for integrating the Board's priorities with the planning process.)

Forms

	Name	MCPS Form Number	Required (R) Optional (O)
_____	Worksheet	–	O
_____	Stages and Steps	–	O
_____	Planning Team Record	345-50	O
_____	Noteworthy Program Description	345-51	O
_____	Needs to Assess	345-52	R (check with supervisor)
_____	Indication of Need (critical form)	345-53	R
_____	Consolidating Objective	345-54	R (area office only)
_____	Action Plan (critical form)	345-55A	R
_____	Scheduling Milestones (Page four of 345-55A)		(as needed)
_____	Action Plan Activities for Reduction	345-55B	(as needed)
_____	Status Report	345-56	R

Planner (Signature)	Title	Date

MCPS COMPREHENSIVE PLANNING PROCESS

School/Office/Department/Division/Unit	Area

STAGES AND STEPS*

	Date Initiated/Date Completed
Stage I - EXAMINE APPROVED PURPOSES/PRESENT PROGRAM	
1. Examine Approved Purposes	1. ___/___
2. Examine Present Program	2. ___/___
Stage II - IDENTIFY NOTEWORTHY PROGRAMS/ACTIVITIES TO ELIMINATE/NEEDS TO ASSESS	
3. Identify Noteworthy Programs	3. ___/___
4. Identify Activities Eligible for Reduction or Elimination	4. ___/___
5. Identify Initial Set of Needs to Assess	5. ___/___
6. Confirm Programs, Activities, and Needs with Supervisor	6. ___/___
Stage III - ASSESS/PRIORITIZE NEEDS AND ESTABLISH OBJECTIVES	
7. Conduct the Needs Assessment	7. ___/___
8. Prioritize Needs and Select Needs to Pursue	8. ___/___
9. Establish Tentative Objectives with Standards	9. ___/___
10. Review the Priorities, Needs, and Objectives with Supervisor	10. ___/___
11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels	11. ___/___
Stage IV - DEVELOP ACTION PLANS/BUDGET REQUESTS	
12. Develop Several Possible Plans for Each Current Need	12. ___/___
13. Select Preferred Plans	13. ___/___
14. Integrate Previous Year's Needs with Current Needs	14. ___/___
15. Examine and Revise Previous Plans Based Upon Approved Resources	15. ___/___
16. Separate Plans Into Years of Implementation and Budget	16. ___/___
17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor	17. ___/___
18. Reconcile and Approve Plans and FY 81 Budget Requests at All Levels	18. ___/___
Stage V - IMPLEMENT PLANS	
19. Implement Plans	19. ___/___
Stage VI - EVALUATE/RECYCLE	
20. Reevaluate Plans and Evaluate Results	20. ___/___
21. Recycle	21. ___/___

*Steps 3, 4, 12, 14–16 are optional for 1979-80.

EXPIRATION: March 1980

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

PLANNING TEAM RECORD

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Prior to Step 1

School/Office/Department/Division/Unit	Area

Local Planning Team

Member	Affiliation	Planning Step Involvement	Member Initials

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

MCPS Form 345-50, April 1979

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NOTEWORTHY PROGRAM DESCRIPTION

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 3

School/Office/Department/Division/Unit	Area

1. Program Name	
2. Topic and Category	
3. Program Focus	
4. Date Program Began	(Month, Year)
5. Grade Level(s)	
6. Contact Person	
7. Telephone Number	
8. Major Program Objectives (Student/Client Performance Objectives)	
9. Characteristics of students/clients served by the program	

MCPS Form 345-51, April 1979

10. Procedures/instruments used to identify students/clients	
11. Description of program activities for students/clients	
12. Time (in hours) student/client participates in program weekly	
13. Program length (term during the school year)	
14. Staffing	
15. Student-teacher ratio (if applicable)	
16. Special features/comments	

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments: (Include indication of quality):

Signature	Title	Date

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NEEDS TO ASSESS

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 4-6

School/Office/Department/Division/Unit | Area

List each identified need for which you are considering program or administrative changes. This includes needs with either positive or negative differences between "what is" and "what should be," i.e., performance expectations which may result in additions to the program or eliminations of current activities. For each needs statement, list source(s) of information showing an indication of need and an approved purpose. On Side 2 describe the method by which you plan to assess the needs. Use additional sheets as necessary to describe all needs.

A Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

B Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

C Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

D Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

E Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

F Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

G Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

H Preliminary Needs Statement

Indication of need:

Approved purposes:

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

Proposed method of assessing needs

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

INDICATION OF NEED

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 6-10

School/Office/Department/Division/Unit

Area

Need considered for: (check one) ☐ Increased emphasis ☐ Reduced emphasis

Statement of need

PRIORITY
No.___of___

Topic

Category

Objectives with standards

Approved purpose(s) or rationale

Estimated savings (to be completed only for needs addressing reductions or eliminations.)

a. Number of person days: professional_____; supporting services_____.

b. Other:_____

Form 345-53, April 1979

Summary of needs assessment data

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

CONSOLIDATING OBJECTIVE

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 11

Office/Department

Area

Consolidating Objective:

PRIORITY
No.___of___

Topic

Category

List the name of each unit which has needs addressed by this consolidating objective and the priority assigned to each need. Attach corresponding MCPS Forms 345-53 which were completed by the units for those needs.

Unit Name	Priority Assigned

☐ Check here if additional units with need priorities are listed on the reverse side.

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature | Title | Date

MCPS Form 345-54, April 1979

EXPIRATION: DRAFT (4/23/79)

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

ACTION PLAN

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 12-19

School/Office/Department/Division/Unit | Area

Plan Name | Priority No

Plan Overview

Projected Start Date _____ Mo /Yr.

Is in-service training required? ☐ Yes ☐ No If yes, is the in-service plan attached? ☐ Yes ☐ No

Expected Results (Attach MCPS Form 345-53. List objective numbers and restate those objectives that have been revised)

Impact on staff and community (Include how the commitment of staff and community was determined.)

Commitment (Circle one. High = 1, Low = 5) Staff 1 2 3 4 5 Community 1 2 3 4 5

Enter the job title for each type responsibility by objective.

Responsibility	Objectives 1	2	3	4
Primary				
Implementation				
Other, (Specify)				

MCPS Form 345-55A, April 1979

Possibilities of nonlocal funding (Explain potential sources, probability of success in acquiring external funding, etc.)

Possibilities of reallocation of existing funds (Explain).

Estimate costs for appropriate fiscal years by budget category for each objective. If it is not possible to separate costs by objective, show costs by objectives combined as appropriate.

	Fiscal Year				
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					
Objective Number_____					
Personnel					
Equipment					
Supplies					
Other					
Total					

ANALYSIS OF THE PLAN

Advantages	Disadvantages

Other Comments:

Scheduling Milestones for Objective No.(s)_____FY_____. List major events or activities necessary to achieve the objectives; indicate projected event completion dates? and list job titles of persons responsible. Using copies of this page, complete and attach one page for each objective.

Milestones/Events	Months* J A S O N D J F M A M J	Responsibilities**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

* Show start date as "0" and end date as "Δ". ** Show responsibility by job title and code as follows: (1)=Primary (2)=Implementation (3)=Other, (Specify)_____

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments

Signature Title Date

Scheduling Milestones for Objective No.(s)_____FY_____. List major events or activities necessary to achieve the objectives; indicate projected event completion dates? and list job titles of persons responsible. Using copies of this page, complete and attach one page for each objective.

Milestones/Events	Months* J A S O N D J F M A M J	Responsibilities**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

* Show start date as "0" and end date as "Δ". ** Show responsibility by job title and code as follows: (1)=Primary (2)=Implementation (3)=Other, (Specify)_____

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments

Signature Title Date

EXPIRATION: DRAFT (4/23/79)

MCPS COMPREHENSIVE PLANNING PROCESS	Office for Program Development MONTGOMERY COUNTY PUBLIC SCHOOLS Rockville, Maryland	ACTION PLAN ACTIVITIES FOR REDUCTION

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. Attach Form 345-53 for the related need.

Planning Process Reference: Steps 12-19

School/Office/Department/Division/Unit	Area

Activity or Program Name:

Type of Funding: ☐ MCPS ☐ MSDE ☐ Federal ☐ Other (Explain):

Why is this activity selected for reduction or elimination? (Check all that apply.)

- ☐ The program has met its objectives and is ready for termination.
- ☐ The original need no longer exists.
- ☐ Other programs have assumed these responsibilities.
- ☐ The relative priority or importance of this activity has shifted.
- ☐ Other, (Specify)

Explain or comment as appropriate.

Overview of the plan for reduction or elimination. (How will it be accomplished?)

Expected results. (Attach Form 345-53. List the objective numbers and restate any that have been revised. Explain the expected impact of the reduction or elimination on students/clients.)

Expected impact on staff and community of the reduction or elimination. (Indicate the level of commitment to the program or activity and describe how this was determined.)

Staff:

Community:

Commitment (Circle one - High=1, Low=5): Staff: 1 2 3 4 5 ; Community: 1 2 3 4 5

Planner (Signature)	Title	Date

FOR SUPERVISOR'S USE

Comments:

Signature	Title	Date

EXPIRATION: DRAFT (4/23/79)

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

STATUS REPORT

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. This report is required quarterly. It may be issued more frequently if desired by the planner or the supervisor.

Planning Process Reference: Step 20

School/Office/Department/Division/Unit | Area

Plan Name

Indicate the status of the plan by checking the appropriate statement and describing any problems that have arisen.

☐ No Problems. All activities within the plan are proceeding on schedule.

☐ Minor Problems. Delays have occurred in reaching milestone(s), but the objective is expected to be accomplished in the planned time frame.
Objective No.____ Milestone(s)____
Objective No.____ Milestone(s)____

☐ Major Problems. Serious or protracted delays have occurred that threaten accomplishment of the objective within the scheduled time. Explain how much delay is expected.
Objective No.____ Milestone(s)____
Objective No.____ Milestone(s)____

Problems, actions, and comments:

Planner (Signature) | Title | Date: For: (Circle) Q1, Q2, Q3, Q4 or Other:____

FOR SUPERVISOR'S USE

Comments:

Signature | Title | Date

MCPS Form 345-56, April 1979

MCPS COMPREHENSIVE PLANNING PROCESS

School/Office/Department/Division/Unit	Area
A SCHOOL	18

STAGES AND STEPS*

	Date Initiated/Date Completed
Stage I - EXAMINE APPROVED PURPOSES/PRESENT PROGRAM	
1. Examine Approved Purposes	1. 5-11 / 5-15
2. Examine Present Program	2. 5-11 / 5-15
Stage II - IDENTIFY NOTEWORTHY PROGRAMS/ACTIVITIES TO ELIMINATE/NEEDS TO ASSESS	
3. Identify Noteworthy Programs	3. 5-15 / 5-15
4. Identify Activities Eligible for Reduction or Elimination	4. 5-15 / 5-25
5. Identify Initial Set of Needs to Assess	5. 5-15 / 5-25
6. Confirm Programs, Activities, and Needs with Supervisor	6. 5-31 / 6-4
Stage III - ASSESS/PRIORITIZE NEEDS AND ESTABLISH OBJECTIVES	
7. Conduct the Needs Assessment	7. 6-4 / 6-18
8. Prioritize Needs and Select Needs to Pursue	8. 6-18 / 6-22
9. Establish Tentative Objectives with Standards	9. 6-26 / 6-29
10. Review the Priorities, Needs, and Objectives with Supervisor	10. 7-2 / 7-16
11. Reconcile and Approve the System Priorities, Needs, and Objectives at All Levels	11. — / —
Stage IV - DEVELOP ACTION PLANS/BUDGET REQUESTS	
12. Develop Several Possible Plans for Each Current Need	12. 7-16 / 8-24
13. Select Preferred Plans	13. 7-16 / 9-3
14. Integrate Previous Year's Needs with Current Needs	14. — / —
15. Examine and Revise Previous Plans Based Upon Approved Resources	15. — / —
16. Separate Plans Into Years of Implementation and Budget	16. — / —
17. Review the Preferred Plans, Integration, Revision, and Separation with Supervisor	17. 9-4 / 9-17
18. Reconcile and Approve Plans and FY 81 Budget Requests at All Levels	18. — / —
Stage V - IMPLEMENT PLANS	
19. Implement Plans	19. 1980 /
Stage VI - EVALUATE/RECYCLE	
20. Reevaluate Plans and Evaluate Results	20. /
21. Recycle	21. /

*Steps 3, 4, 12, 14–16 are optional for 1979-80.

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

PLANNING TEAM RECORD

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Prior to Step 1

School/Office/Department/Division/Unit: A SCHOOL

Area: 18

Local Planning Team

Member	Affiliation	Planning Step Involvement	Member Initials
Mr. Joe Smith	Student	1-5, 7-8	
Miss Mary Allen	Student	1-5, 7-8	
Mrs. Gade	Parent	1-5, 7-8	
Mr. Munn	Librarian	1-5, 7-9	
Mrs. Appleby	Teacher	1-5	
Mr. Goodloe	Teacher	1-5, 7-9	
Miss Michels	Teacher	1-5, 7-9	
Mrs. Wells	Counselor	1-5, 7-9	
Mr. Anderson	Secretary	1-5, 7-8	
Dr. Cann	Ass't. Principal	1-10	

Planner (Signature)	Title	Date
Jerry McGrath	Principal	7-2-79

FOR SUPERVISOR'S USE

Comments: Good representation!

Signature	Title	Date
Linda Smithfield	Area Director Educational Services	7-16-79

S Form 345-50, April 1979

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NOTEWORTHY PROGRAM DESCRIPTION

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 3

School/Office/Department/Division/Unit: A SCHOOL

Area: 18

1. Program Name	Math Opportunities For All
2. Topic and Category	Program - Math
3. Program Focus	Improve Math Skills and Appreciation
4. Date Program Began	Sept. 1975 (Month, Year)
5. Grade Level(s)	7-8-9
6. Contact Person	Modine Gunch
7. Telephone Number	-
8. Major Program Objectives (Student/Client Performance Objectives)	Develop, supply, organize and staff a math lab for use by students for • individualized skills instruction • extended enrichment activities • awareness of career opportunities • games and other activities involving math skills
9. Characteristics of students/clients served by the program	All Students

MCPS Form 345-51, April 1979

10. Procedures/instruments used to identify students/clients	All students have access. Self-selection, teacher referrals, Parental request
11. Description of program activities for students/clients	Self-instructed activities tutorals group activities/demonstrations
12. Time (in hours) student/client participates in program weekly	Varies - minimum of one period a week
13. Program length (term during the school year)	entire school year
14. Staffing	Aide assigned to lab fill-time/teachers assigned IRA period to lab Parent volunteers - assigned to lab 3 days a week.
15. Student-teacher ratio (if applicable)	Varies
16. Special features/comments	Texts, materials and other resources in lab are clearly referenced to Math Curriculum

Planner (Signature)	Title	Date
Jerry Mc Graw	Principal	5-31-79

FOR SUPERVISOR'S USE

Comments: (Include indication of quality) This math lab approach has been greatly refined over the past few years. It is truly an outstanding program. The card system referencing resources to the curriculum is particularly unique.

Signature	Title	Date
Linda Smithfield	Area Director Educational Services	6-3-79

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

NEEDS TO ASSESS

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 4-6

School/Office/Department/Division/Unit: A SCHOOL

Area: 18

List each identified need for which you are considering program or administrative changes. This includes needs with either positive or negative differences between "what is" and "what should be," i.e., performance expectations which may result in additions to the program or eliminations of current activities. For each needs statement, list source(s) of information showing an indication of need and an approved purpose. On Side 2 describe the method by which you plan to assess the needs. Use additional sheets as necessary to describe all needs.

A Preliminary Needs Statement: Ninth grade students scored below grade level in the vocabulary subtest on the ITBS, but scored at grade level on the same subtest in grade 7

Indication of need: ITBS, Subtest - Vocabulary 1975-76, 1977-78

Approved purposes: Program of Studies/Maryland Accountability Program/Goals of Education

Need considered for: (check one) [X] Increased emphasis [ ] Reduced emphasis

B Preliminary Needs Statement: Responses to area and central office requests for data, information, reports, etc., mean that overtime costs increase or other things don't get done.

Indication of need: overtime records, staff concerns

Approved purposes: There is no Board policy related to this, however, efficient management of budget and staff time suggests that this is an unsatisfactory situation.

Need considered for: (check one) [X] Increased emphasis [ ] Reduced emphasis

C Preliminary Needs Statement: Numerous grade level team meetings are not seen as effective and efficient as they should be

Indication of need: Staff evaluation

Approved purposes: School Policy/Procedure Book

Need considered for: (check one) [ ] Increased emphasis [X] Reduced emphasis

D Preliminary Needs Statement: Emphasis on Math over the past 3 years in terms of staffing, materials and use of volunteers has proved effective; test scores are up; students are excited about math; now is the time to address other priorities.

Indication of need: test scores, other concerns cited by parents/staff

Approved purposes: Program of Studies/Goals of Education

Need considered for: (check one) [ ] Increased emphasis [X] Reduced emphasis

E Preliminary Needs Statement: Parent involvement in PTSA has gone from a high of 60% in 1976 to 25% this year.

Indication of need: PTSA membership records

Approved purposes: BOE policy - Regulation 270-10

Need considered for: (check one) [X] Increased emphasis [ ] Reduced emphasis

F Preliminary Needs Statement: Only 50% of the parents contacted came in for individual conferences last year as compared to an average of approximately 90% (what should be) for the previous year.

Indication of need: Secretary's record

Approved purposes: BOE policy 355-4, Goals of Education

Need considered for (check one) [X] Increased emphasis [ ] Reduced emphasis

G Preliminary Needs Statement: The amount of food wasted in the cafeteria seems to be higher than normal this year and should be reduced.

Indication of need: Lunchroom monitors

Approved purposes: BOE policy 240-2

Need considered for (check one) [X] Increased emphasis [ ] Reduced emphasis

H Preliminary Needs Statement: Homework assignments are not being completed properly and on time by far too many students.

Indication of need: Discussions at faculty meetings

Approved purposes: BOE policy 301-3

Need considered for (check one) [X] Increased emphasis [ ] Reduced emphasis

Proposed method of assessing needs

Our planning team has divided into subcommittees to investigate each need. After data is collected, we will compare notes and summarize this data. Both the faculty and PTA executive committee will be asked to rank each need and add comments. The planning team will then look at the ranking and develop a prioritized list and select those needs we wish to pursue. Two teachers and myself will then write the objectives.

Planner (Signature)	Title	Date
Jerry McGraw	Principal	6/4/79

FOR SUPERVISOR'S USE

Comments: Sounds good! Of course, parents & pupils might need to change the planning team, review the objectives (cont. below)

Linda Smithfield — Area Director Educational Services — 6/18/79
Signature — Title — Date

2

... this statement in item C should be refined

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

INDICATION OF NEED

INSTRUCTIONS. This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979 80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 6-10

School/Office/Department/Division/Unit: A SCHOOL

Area: 18

Need considered for: (check one) [X] Increased emphasis [ ] Reduced emphasis

Statement of need: Ninth grade students scored five months below grade level on the vocabulary subtest of the ITBS, but scored at grade level on the same subtest as seventh graders.

PRIORITY No. 1 of 5

Topic: Sch. Com. Chan

Category:

Objectives with standards

(1) Identify, then acquire and/or develop supplemental materials for vocabulary development for grades 8 & 9. Sufficient materials should be available in the school's reading lab; so that neither students nor teachers will have to wait more than a week to receive an item.

(2) Each teacher will prepare a list of vocabulary words for his/her course(s). Eighty percent of the students should be able to demonstrate on teacher made instruments that they know eighty percent of the words.

(3) Generally provide sufficient instruction in vocabulary development so that ninth grade students score at or above grade level on this particular subtest of the ITBS.

Approved purpose(s) or rationale

MCPS Goals of Education
MCPS Program of Studies
Maryland Accountability Program

Estimated savings (to be completed only for needs addressing reductions or eliminations.)

a. Number of person days: professional _____ ; supporting services _____

b. Other: _____

Summary of needs assessment data

(1) Iowa Tests of Basic Skills
Vocabulary Subtest

	1975-76	1977-78	Norm
7th Graders	7.6	7.7	7.6
9th Graders	8.9	8.7	9.3

(2) The school's reading lab has only two books and 1 kit on vocabulary development for student's use. None of these materials have been checked out more than once a semester in the last three years.

(3) Outside of Language Arts Teachers, only one teacher has any commercial materials for vocabulary development.

(4) Seventy-five percent of the teaching staff indicated through a survey that very little time was now being spent on vocabulary development and more should be spent.

(5) Ninety percent of the teaching staff felt that compiling vocabulary lists for their courses would benefit their instructional capability and students.

Planner (Signature)	Title	Date
Terry McGraw	Principal	6/29/79

FOR SUPERVISOR'S USE

Comments: Have the reading supervisors from the area office and Central Office assessed this need?

Linda Smithfield — Area Director Educational Services — 7/16/79

Signature — Title — Date

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

INDICATION OF NEED

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 19/9-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 6-10

School/Office/Department/Division/Unit: A SCHOOL

Area: 18

Need considered for: (check one) [X] Increased emphasis [ ] Reduced emphasis

Statement of need: Responses to "outside" requests necessitating clerical support have meant overtime costs or "inside" requests not being met.

PRIORITY No. 2 of 5

Topic: Ad. Org.

Category: Ad. Org.

Objectives with standards

1. Eliminate all clerical overtime.
2. Maintain routine office functions satisfactorily, as judged jointly by the principal and his secretary.
3. Meet at least 60 % of staff requests for typing assistance as indicated by log of requests for clerical help.
4. Respond to all area and central office requests for information, which are required, within the allotted timeframe.

Approved purpose(s) or rationale

Job Descriptions
Efficient management of budget and staff time suggests that this is presently an unsatisfactory situation.

Estimated savings (to be completed only for needs addressing reductions or eliminations.)

a. Number of person days: professional _____ ; supporting services _____

b. Other: _____

Summary of needs assessment data

1. $865. in overtime expenses to date this year.
2. Eighty percent of the total building staff felt this was a problem when surveyed.
3. All of the clerical and administrative staff felt this was a very serious problem in the same survey.
4. Secretary's file of 37 reports for persons outside the building that have not been completed on schedule to date this year.
5. Frustration of clerical and secretarial staff indicated by turnover of 3 clerks in the last year.
6. A file of written complaints and notes of verbal complaints about requests not being typed in a timely fashion.

Planner (Signature)	Title	Date
Terry McGraw	Principal	6/29/79

FOR SUPERVISOR'S USE

Comments: We have a similar problem in the area office. Let me know what requests/reports you think we can eliminate or combine to reduce the burden. Good luck!

Linda Smithfield — Area Director Educational Services

Signature — Title — Date 7/16/79

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

CONSOLIDATING OBJECTIVE

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Step 11

Office/Department: AREA OFFICE

Area: 18

Consolidating Objective: Attention will be given to reading and language arts programs/instruction so that students at selected schools will collectively score at or above grade level (by 1981) on those portions of the standardized tests.

PRIORITY No. 2 of 8

Topic: Program

Category: Reading/LA

List the name of each unit which has needs addressed by this consolidating objective and the priority assigned to each need. Attach corresponding MCPS Forms 345-53 which were completed by the units for those needs.

Unit Name	Priority Assigned
A School	1
The School	3
A School II	2
B School	3
C Junior High	2
Another School	3
Still Another School	4

☐ Check here if additional units with need priorities are listed on the reverse side.

Planner (Signature)	Title	Date
Linda Smithfield	Area Dir. for Ed. Services	9-13-79

FOR SUPERVISOR'S USE

Comments: Agree the goal - reading - needs attention. Timing be careful not to over-emphasize the test

Signature	Title	Date
Albert Kalinsky	Deputy Superintendent	9-20-79

MCPS Form 345-54, April 1979

EXPIRATION: March 1980

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

INDICATION OF NEED

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 6-10

School/Office/Department/Division/Unit: A School

Area: 18

Need considered for: (check one) [x] Increased emphasis [ ] Reduced emphasis

Statement of need: Ninth grade students scored five months below grade level on the vocabulary subtest of the ITBS, but scored at grade level on the same subtest as seventh graders.

PRIORITY No. 1 of 5

Topic: Sch. Com. Char.

Category:

Objectives with standards

(1) Identify, then acquire and/or develop supplemental materials for vocabulary development for grades 8 & 9. Sufficient materials should be available in the school's reading lab; so that neither students nor teachers will have to wait more than a week to receive an item.

(2) Each teacher will prepare a list of vocabulary words for his/her courses(s). Eighty percent of the students should be able to demonstrate on teacher made instrucments that they know eighty percent of the words.

(3) Generally provide sufficient instruction in vocabulary development so that ninth grade students score at or above grade level on this particular subtest of the ITBS.

Approved purpose(s) or rationale

MCPS Goals of Education
MCPS Program of Studies
Maryland Accountability Program

Estimated savings (to be completed only for needs addressing reductions or eliminations.)

a. Number of person days: professional _____ ; supporting services _____ .

b. Other: _____

Summary of needs assessment data

(1) Iowa Tests of Basic Skills
Vocabulary Subtest

	1975-76	1977-78	Norm
7th Graders	7.6	7.7	7.6
9th Graders	8.9	8.7	9.3

(2) The school's reading lab has only two books and 1 kit on vocabulary development for student's use. None of these materials have been checked out more than once a semester in the last three years.

(3) Outside of Language Arts Teachers, only one teacher has any commercial materials for vocabulary development.

(4) Seventy-five percent of the teaching staff indicated through a survey that very little time was now being spent on vocabulary development and more should be spent.

(5) Ninety percent of the teaching staff felt that compiling vocabulary lists for their courses would benefit their insturctional capability and students.

Planner (Signature)	Title	Date
Terry McGraw	Principal	6/29/79

FOR SUPERVISOR'S USE

Comments: Have the reading supervisors from the area office and central office assessed this need

Linda Smithfield — Area Director for Ed. Services — 7/16/79

Signature — Title — Date

EXPIRATION: DRAFT (4/23/79)

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

ACTION PLAN

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step.

Planning Process Reference: Steps 12-19

School/Office/Department/Division/Unit: A School

Area: 18

Plan Name: Improvement of 9th grade ITBS scores on vocabulary subtest

Priority No.: 1

Plan Overview

Projected Start Date: 9 / 79 (Mo./Yr.)

School-wide effort on vocabulary enrichment to improve scores on ITBS. All subject areas except P.E. will be involved. Reading specialists will supply necessary materials and work together with staff to help with implementation. Each subject area will develop vocabulary lists and include in regular lessons.

Is in-service training required? ☐ Yes ☒ No If yes, is the in-service plan attached? ☐ Yes ☐ No

Expected Results (Attach MCPS Form 345-53. List objective numbers and restate those objectives that have been revised.)

See Form 345-53 (enclosed)

Impact on staff and community (Include how the commitment of staff and community was determined.)

Both staff and school community decided that there should be a concentrated effort to improve test scores in the vocabulary subtest. Results showed 7th grade scores were at grade level and 9th grade scores for some students were below grade level. Since the school has enjoyed a favorable reputation in the past, the staff and community are determined to maintain a positive feeling. Teachers, reading specialists, and parents indicated they would be willing to support program through classroom instruction, and at home.

Commitment (Circle one - High = 1, Low = 5): Staff 1 (2) 3 4 5, Community (1) 2 3 4 5

Enter the job title for each type responsibility by objective.

Responsibility	Objectives 1	2	3	4
Primary	Rdg. Spec. Connell Teachers	Teach. Appleby & Connell Teachers	Teach. Appleby Teachers/Rdg Specialists	
Implementation				
Other. (Specify):				

MCPS Form 345-55A, April 1979

Resources	Description and Number Fiscal Year FY 81	FY 82
IV. Other		
A. Travel (and fees)		
1. Local		
2. Out-of-State		
3. Fees		
B. Utilities		
1. Telephone (installation, operation)		
2. Other		
C. Fixed Charges		
1. Insurance		
D. Grants		
E. Other		
V. Furniture	In House Transfer	
VI. Equipment		Possible request for self-instructional equipment
VII. Transportation (Pupil)		
III. Food Service		
IX. Maintenance		
X. Facilities	Renovate storage room 106	

Explanation of Reallocations: Include major items which should be noted by your supervisor. (Indicate by Roman numberals and letters for references.)

Possibilities of nonlocal funding (Explain potential sources, probability of success in acquiring external funding, etc.)

None explored (although RIF - Reading Is Fundamental was mentioned for future investigation)

Indicate the resources required by this plan to meet the objectives. Be as specific as possible. Also, check (✓) those items which will require reallocations of existing funds and explain below.

Resources	Description and Number Fiscal Year FY 81	FY 82
I. Salaries and Wages		
A. Certificated Staff		
B. Supporting Services Staff		
C. Other (i.e., Substitutes, Per Diem Days, Clerical)	Per Diem Days- Reading Sp. 10 Days	Same
II. Contractural Services		
A. Consultants		
B. Advertising		
C. Rental Costs		
D. Other		
III. Supplies and Materials		
A. Instructional	Variety of supplemental for objective 1 - approx. $1,000	Same, except $500
B. Office		

Explanation of Reallocations: Include major items which should be noted by your supervisor. (Indicate by Roman numerals and letters for references.)

III A the media center will contribute $400 from allocations
the reading specialist will contribute $300 from allocations
the classroom teachers will contribute $300 from allocations

ANALYSIS OF THE PLAN

Advantages

1. Students will see how important tests are by emphasis on school-wide improvement program.
2. School will develop library of material in vocab. enrichment.
3. Greater communication among teachers, reading specialists, administration as a result of the program.
4. Participation of total staff in one particular program.
5. If enrichment were needed in another area, this program could be used as example.
6. Implementation is possible with existing staff - no need to hire new personnel.
7. Involvement of community in planning school programs.
8. Able to use parent volunteers.
9. Meeting time minimal.
10. Less $ to develop rather than buy commercial program

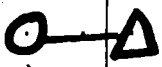
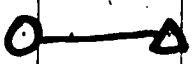
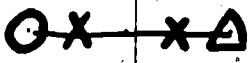
Disadvantages

1. Emphasis on improvement of test scores could detract from regular classroom activities.
2. Students may receive "over-instruction" and lose interest.
3. Results may not live up to expectations.
4. May lose opportunity to do "other" creative activities in classroom.
5. Time for planning and implementation might not be sufficient.

Other Comments.

If the advantages outweigh the disadvantages in practice, it will be a good and beneficial program for our students. We certainly have the commitment of the staff and community to make it work. The decision to work with what we have and develop our own materials and purchasing only what is essential will keep the cost of the program down.

Scheduling Milestones for Objective No.(s) 1 FY 79/80. List major events or activities necessary to achieve the objectives; indicate projected event completion dates? and list job titles of persons responsible. Using copies of this page, complete and attach one page for each objective.

Milestones/Events	Months* J A S O N D J F M A M J	Responsibilities**
1. 1. Meet with teachers, reading specialists, parents to discuss program		1-McGraw - Prin 2- " "
2. Review materials in reading lab.		1-Rdg. Spec. Connell 2- "
3. Determine if new materials must be acquired and/or developed.		1-Rdg. Spec./Connell Teacher/Appleby 2- Rdg. Spec.
4. Acquire and/or develop materials according to teachers and students needs/requests.		1-Rdg. Spec. Connell Teach. Appleby 2- "
5. Reading lab. to set up schedule for requests from teachers and students		1-Rdg. Spec. Connell 2- "
6. Meet with teachers involved, reading specialists for progress reports		1-McGraw - Prin. 2- "
7. Reading lab has developed a form for requests		
8.		

* Show start date as "0" and end date as "Δ". 'X' show meetings

** Show responsibility by job title and code as follows: (1)=Primary (2)=Implementation (3)=Other, (Specify)_____

Planner (Signature)	Title	Date
Terry McGraw	Principal	10/19/79

FOR SUPERVISOR'S USE

Comments Could you send me a form used by the reading lab? Perhaps one of the area or county reading supervisors could be involved in the assessment of the program.

Linda Smithfield — Signature

Area Dir. for Ed. Services — Title

10/31/79 — Date

Scheduling Milestones for Objective No.(s) 2 FY 79/80 List major events or activities necessary to achieve the objectives; indicate projected event completion dates; and list job titles of persons responsible. Using copies of this page, complete and attach one page for each objective.

Milestones/Events	Months* J A S O N D J F M A M J	Responsibilities**
1. Preparation of vocabulary lists by subject area	O—Δ	1 - Teacher/Appleby 2- Teacher/Rdg. Spec.
2. Collect lists from each subject area.	O—Δ	1- Admin (McBain) 2- "
3. Develop quizzes, tests, or measures of assessment	O———Δ	1- Appleby/Connell 2- "
4. Periodic Assessment of Students on vocabulary	O X X Δ - - - - - -	1- Teacher (Appleby) 2- Teacher/Rdg. Spec/ Aide
5. Final evaluation of all words on vocabulary lists.	O———Δ	1- Teacher (Appleby) 2- Teacher
6. Collect quizzes/tests and results	O—Δ	1- Admin. (McGraw) 2- "
7. Record results to determine if 80% of students knew 80% of words	O—Δ	1- Rdg. Spec/Connell 2- "
8.		

* Show start date as "O" and end date as "Δ". --Cont. Evaluation('X' - meetings)

** Show responsibility by job title and code as follows: (1)=Primary (2)=Implementation (3)=Other, (Specify)

Planner (Signature)	Title	Date
Terry McGrath	Principal	10-19-79

FOR SUPERVISOR'S USE

Comments Perhaps teacher aides/volunteers could help administer quizzes to small groups and provide up to date help for those students who need it. Also - might be a good idea to get super-ability students helping those who have learning problems.

Linda Smithfield — Signature

Area Dir. for Ed. Services — Title

10/31/79 — Date

Scheduling Milestones for Objective No.(s) 3 FY 79/80 List major events or activities necessary to achieve the objectives; indicate projected event completion dates; and list job titles of persons responsible. Using copies of this page, complete and attach one page for each objective.

Milestones/Events	Months* J A S	O N D	J F M	A M J	Responsibilities**
1. Gather data on how vocabulary enrichment is incorporated into classes.	O———		———Δ		1 - Admin/ Rdg. Spec McGraw/Connell 2- Rdg. Spec.
2. Observe classes on days when vocabulary enrichment is part of lesson.		O———	———Δ		1- Admin/McGraw 2- Admin./Rdg. Spec.
3. Meet with reading specialists, teachers to discuss ITBS test procedures.			⊗Δ		Rdg./Spec.(Connell)/ 1- Admin. -(McGraw)/ 2- "
4. Meet with reading specialists teachers to discuss results of test scores.				OΔ	1- 1 - Admin-(McGraw) 2- "
5. Evaluate effectiveness of program				OΔ	
6. Distribute results to area office, supervisors, parents, teachers, etc..				Δ⊙	1- Admin. (McGraw) 2- Rdg. Spec.
7.					
8.					

* Show start date as "O" and end date as "Δ". "X" - Meetings -- Cont. Evaluation

** Show responsibility by job title and code as follows: (1)=Primary (2)=Implementation (3)=Other, (Specify)

Planner (Signature)	Title	Date
Mary McGraw	Principal	10-19-79

FOR SUPERVISOR'S USE

Comments: Area Superintendent to review with principal and reading teacher when it would be time to discuss the program at the appropriate time and ask for their suggestions and comments

Linda Smithfield	Area Dir. for Ed. Services	10-31-79
Signature	Title	Date

EXPIRATION: DRAFT (4/23/79)

MCPS COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

ACTION PLAN
ACTIVITIES FOR REDUCTION

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. Attach Form 345-53 for the related need.

Planning Process Reference: Steps 12-19

School/Office/Department/Division/Unit	Area
A School	18

Activity or Program Name:
Improve Math Skills

Type of Funding: [X] MCPS [ ] MSDE [ ] Federal [ ] Other (Explain):

Why is this activity selected for reduction or elimination? (Check all that apply.)

- [X] The program has met its objectives and is ready for termination.
- [ ] The original need no longer exists.
- [X] Other programs have assumed these responsibilities.
- [X] The relative priority or importance of this activity has shifted.
- [ ] Other, (Specify)

Explain or comment as appropriate.

Too expensive in terms of both time and money to maintain program; too much emphasis on math program and not enough in other areas. Perhaps funds originally used in math can be reallocated for use in other areas where there is a need. Also, parent volunteers in math can be used in new Language Arts Program.

Overview of the plan for reduction or elimination. (How will it be accomplished?)

Disperse material to math teachers if needed.
Use the volunteeers and aides in other subject areas
Move math lab to another area, if possible and use space for current program
Math lab will continue to be staffed by two professional staff members and one aide. The volunteer parents will be assigned to work in math classes where students have been placed upon completion of math lab experience. The math teachers will assist in monitoring basic math materials to insure an adequate supply.

Expected results. (Attach Form 345-53. List the objective numbers and restate any that have been revised. Explain the expected impact of the reduction or elimination on students/clients.)

We didn't fill out form for this because it was not one of our top priorities. We want to continue the enthusiasm for our math program, but not at the expense of other areas. Students will continue to share gains in math skills as demonstrated on ITBS subtest through limited use of math lab and more classroom support by aides and volunteers. Parents will be notified that students may at any time be rescheduled into the math lab should that become necessary. But the major exphasis will be on improved classroom support.

Expected impact on staff and community of the reduction or elimination. (Indicate the level of commitment to the program or activity and describe how this was determined.)

Staff: Recently, there has been less of a need for extra planning in math. Staff and community agree that we should rechannel our successful efforts from math department to other areas. We will continue to use our parent volunteers in other subject areas. Math will become less visible but this will enable other programs to be noted.
The decision to diminish the Math Lab services was reached in a staff meeting where classroom teachers expressed the concern that they have students in serious need of remediation and the Math Lab cannot provide instruction for all such students. More classroom support is needed in addition to the Math Lab.

Community: Parents have some concern about diminishing such an effective program. However, learning of the plan to increase classroom support has dispelled many anxieties about the remedial math services available at A School.

Commitment (Circle one - High=1, Low=5): Staff: 1 (2) 3 4 5 ; Community: 1 2 (3) 4 5

Planner (Signature)	Title	Date
Terry McGraw	Principal	10-19-79

FOR SUPERVISOR'S USE

Comments: This seems a reasonable way to reduce emphasis on the remedial math service. The district will continue to give the strong message to parents that remedial math services are available at A School.

Signature	Title	Date
Fred Armstrong	Area Dir. Ed. Services	10-31-79

EXPIRATION: DRAFT (4/23/79)

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

STATUS REPORT

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. This report is required quarterly. It may be issued more frequently if desired by the planner or the supervisor.

Planning Process Reference: Step 20

School/Office/Department/Division/Unit: A School

Area: 18

Plan Name: Improvement of 9th grade ITBS scores on vocabulary subtest

Indicate the status of the plan by checking the appropriate statement and describing any problems that have arisen.

[X] No Problems. All activities within the plan are proceeding on schedule.

[ ] Minor Problems. Delays have occurred in reaching milestone(s), but the objective is expected to be accomplished in the planned time frame.
Objective No.____ Milestone(s)____
Objective No.____ Milestone(s)____

[ ] Major Problems. Serious or protracted delays have occurred that threaten accomplishment of the objective within the scheduled time. Explain how much delay is expected.
Objective No.____ Milestone(s)____
Objective No.____ Milestone(s)____

Problems, actions, and comments:

So far, so good, however, we've just started. Teachers and students seem receptive to the program.

Planner (Signature): Terry Dunegrad
Title: Principal
Date: Sept. 26, 1980
For: (Circle) Q1 Q2 Q3 Q4
or
Other:

FOR SUPERVISOR'S USE

Comments: You might want to start keeping an up-to-date journal of activities in case you need to do this another year.

Linda Smithfield — Signature
Area Dir. for Ed. Services — Title
Oct. 4. 1980 — Date

Form 345-56, April 1979

EXPIRATION: DRAFT (4/23/79)

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

STATUS REPORT

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. This report is required quarterly. It may be issued more frequently if desired by the planner or the supervisor.

Planning Process Reference: Step 20

School/Office/Department/Division/Unit	Area
A School	18

Plan Name

Improvement of 9th grade ITBS scores on vocabulary subtest

Indicate the status of the plan by checking the appropriate statement and describing any problems that have arisen.

☐ No Problems. All activities within the plan are proceeding on schedule.

☒ Minor Problems. Delays have occurred in reaching milestone(s), but the objective is expected to be accomplished in the planned time frame.
Objective No. 1 Milestone(s) 3
Objective No. 2 Milestone(s) 2

☐ Major Problems. Serious or protracted delays have occurred that threaten accomplishment of the objective within the scheduled time. Explain how much delay is expected.
Objective No. _____ Milestone(s) _____
Objective No. _____ Milestone(s) _____

Problems, actions, and comments:

Reading specialists wanted to purchase more materials than we had funds. Is there any extra money available in the area? (obj. 1, milestone 3)

A few teachers were late in turning in vocabulary lists, however, this will not hamper the total program.

Planner (Signature) Terry McGraw | Title Principal | Date: Dec. 15, 1980 | For: (Circle) 01 02 03 04 | or Other: _____

FOR SUPERVISOR'S USE

Comments: $100. available to spend if you still need it. Keep me informed as to your progress.

Linda Smithfield — Signature | Area Dir. for Ed. Services — Title | Dec. 17, 1980 — Date

MCPS Form 345-56, April 1979

EXPIRATION: DRAFT (4/23/79)

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

STATUS REPORT

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. This report is required quarterly. It may be issued more frequently if desired by the planner or the supervisor.

Planning Process Reference: Step 20

School/Office/Department/Division/Unit: A School

Area: 18

Plan Name

Improvement of 9th grade ITBS scores on vocabulary subtest

Indicate the status of the plan by checking the appropriate statement and describing any problems that have arisen.

[X] No Problems. All activities within the plan are proceeding on schedule.

[ ] Minor Problems. Delays have occurred in reaching milestone(s), but the objective is expected to be accomplished in the planned time frame.
Objective No.____ Milestone(s)____
Objective No.____ Milestone(s)____

[ ] Major Problems. Serious or protracted delays have occurred that threaten accomplishment of the objective within the scheduled time. Explain how much delay is expected.
Objective No.____ Milestone(s)____
Objective No.____ Milestone(s)____

Problems, actions, and comments:

Corrected delays during QZ - We are back on schedule on schedule now.

Planner (Signature): Terry McGrail

Title: Principal

Date: March 20, 1981
For: (Circle) Q1, Q2, Q3, Q4
or
Other:____

FOR SUPERVISOR'S USE

Comments:

Linda Smethurst — Signature

Area Dir. for Ed. Services — Title

April 3, 1981 — Date

MCPS Form 345-56, April 1979

EXPIRATION: DRAFT (4/23/79)

COMPREHENSIVE PLANNING PROCESS

Office for Program Development
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

STATUS REPORT

INSTRUCTIONS: This form is to be completed by designated planners within the time frame established by the approved comprehensive planning process. Refer to the 1979-80 *Guidebook* for explanation and directions regarding each planning step. This report is required quarterly. It may be issued more frequently if desired by the planner or the supervisor.

Planning Process Reference: Step 20

School/Office/Department/Division/Unit: A School

Area: 18

Plan Name: Improvement of 9th grade ITBS scores on vocabulary subtest

Indicate the status of the plan by checking the appropriate statement and describing any problems that have arisen.

☐ No Problems. All activities within the plan are proceeding on schedule.

☒ Minor Problems. Delays have occurred in reaching milestone(s), but the objective is expected to be accomplished in the planned time frame. Objective No. 3 Milestone(s) 5
Objective No. ____ Milestone(s) ____

☐ Major Problems. Serious or protracted delays have occurred that threaten accomplishment of the objective within the scheduled time. Explain how much delay is expected. Objective No. ____ Milestone(s) ____
Objective No. ____ Milestone(s) ____

Problems, actions, and comments:

Reading specialists were not sure if they would be able to evaluate the year's program by the end of the school year. They will complete evaluation within one week after the end of the school year.

Planner (Signature): Terry McGinnis
Title: Principal
Date: June 30, 1981
For: (Circle) Q1, Q2, Q3, Q4
or
Other: ____

FOR SUPERVISOR'S USE

Comments: Plan indicates they anticipate success - Monitor as appropriate - progress

Linda Smithfield — Signature
Area Dir. for Ed. Services — Title
July 6, 1981 — Date

MCPS Form 345-56, April 1979

"Getting to Know the Process"

Using the planning materials, participants are asked to complete the items below providing the best possible answer(s) regarding the MCPS Comprehensive Planning Process. The 1979-80 Guidebook is the major reference paper for these questions, although some inferences must be made and the other papers provide further enlightenment.

For each item mark the best response. In some cases more than one answer is correct.

Example:

This paper is a _____.

a) Test
b) Questionnaire
c) Scavenger hunt
d) Way to acquaint one with the process
e) Job application

1. A "need" as defined by the planning process is the same as a _____.

a) Goal
b) Program
c) Solution
d) Resource
e) Plan
f) None of these

2. The Comprehensive Planning Process will address itself only to student outcomes.

_____ True _____ False

3. The Board of Education will be encouraged to actively participate in the Comprehensive Planning Process by _____.

a) Outlining action plans for the staff
b) Identifying liaisons for each local planning team
c) Approving all priorities
d) Approving systemwide priorities
e) b and c
f) b and d

4. The use of the Comprehensive Planning Process this year will result in _____.

a) The Comprehensive Facilities Plan
b) An MCPS Master Plan
c) Long-range plans
d) Forecasting techniques
e) FY 81 plans and budget requests

5. A planner reviews preferred plans with his or her supervisor in _____.

a) Step 6
b) Stage VI
c) Stage III
d) Step 10
e) Stage IV

6. Status reports (relative to the Comprehensive Planning Process) are submitted to one's supervisor _____.

a) Weekly
b) Quarterly
c) Monthly

7. Action plans should contain (check all that apply) _____.

a) Reference to approved purpose
b) Program strengths
c) Objectives
d) Schedule of milestones
e) Advantages and disadvantages

8. A planner should justify needs only with facts not opinions.

_____ True _____ False

9. The "School Information Summary" and the "Supplement to School Information Summary" contain all of the data elements an MCPS principal (planner) can present to his/her supervisor for verifying needs.

_____ True _____ False

10. Previously approved objectives which remain unmet can be considered needs.

_____ True _____ False

11. This year only, Step 14 will be done prior to Step 5.

_____ True _____ False

12. Each local planning team must include ten members.

_____ True _____ False

13. The rationale for identifying noteworthy programs is _____.

a) To select persons eligible for stock options
b) To provide recognition for special programs
c) To build upon organizational strengths
d) b and c

14. It is possible to eliminate some present activities as part of the Comprehensive Planning Process.

_____ True _____ False

15. Identify which of the items below represent "Approved Purposes" and should be considered when planning.

_____ Program of Studies
_____ School Information Summaries
_____ Annual Test Report
_____ Board Policies
_____ Mission Statements
_____ State and Federal Guidelines
_____ MCPS Goals of Education
_____ Digest of Educational Statistics

16. Each planner participating in the initial (pilot) year must do each of the 21 steps.

_____ True _____ False

17. Each planner should include in his/her needs assessment all of the possible needs which have been identified.

_____ True _____ False

18. An "Indication of Need" form is to be completed for all of the needs which were assessed.

_____ True _____ False

19. The Comprehensive Planning Process should result in _____ priorities.

a) A reduction in the number of
b) Each unit having only two
c) 200 MCPS
d) Each unit having 15
e) 25 systemwide

20. "Action Plans" should include _____.

a) Indication of committment
b) A lot of activity
c) Advantages and disadvantages
d) Estimated costs
e) Reference to an approved purpose

21. The identification of noteworthy programs is optional for the initial year of implementing the Comprehensive Planning Process.

_____ True _____ False

22. MCPS Form 345-51 is optional for the inital year.

_____ True _____ False

23. The actual topics and categories to use when classifying needs (and on the forms) can be found in the _____.

a) Program of Studies
b) MCPS Goals of Education
c) School Information Summaries
d) Operating Budget for FY 79
e) Conceptual Overview
f) MCPS Need Assessment Process

24. Each planner has to complete which of the following forms?

_____ "Action Plan"
_____ MCPS Form 345-54
_____ "Indication of Need"
_____ "Planning Team Record"
_____ MCPS From 945-63.1A

25. It is suggested that Step 6 be achieved in a face-to-face meeting.

_____ True _____ False

26. The coordinator of systemwide planning has to approve all plans before they can be presented to the Board.

_____ True _____ False

27. Within the Comprehensive Planning Process priority has the same definition as objective.

_____ True _____ False

28. It is possible for a needs assessment to be based solely upon existing data; i.e., not requiring the gathering of additional documentation.

_____ True _____ False

29. A needs assessment should always involve a questionnaire to be sent to the community.

_____ True _____ False

30. Only information supporting a particular need should be given on the "Indication of Need" form.

_____ True _____ False

31. A planning team which identifies a need outside its mission or realm of authority, should _____.

a) Notify either the FBI or Jack Anderson
b) Alert the appropriate planning unit
c) Write a letter to the editor for the local paper
d) Start a petition drive

32. Supervisors collect the priorities of their subdivisions, without comment.

_____ True _____ False

33. The Comprehensive Planning Process is intended to provide the Board of Education with "grassroots input."

_____ True _____ False

34. A milestone is a _____.

a) Big rock
b) Part of the "Noteworthy Program" form
c) Term signifying who has prime responsibility for a plan
d) Poorly written objective
e) Major event or activity necessary to achieve an objective

35. A need statement should be approved, if it is in an important area, even though it describes a resource (i.e., "More library books are needed.").

_____ True _____ False

36. As much as possible, need statements should describe gaps between "what is" and "what ought to be."

_____ True _____ False

Answer Key

"Getting to Know the Process"

Using the planning materials, participants are asked to complete the items below providing the best possible answer(s) regarding the MCPS Comprehensive Planning Process. The 1979-80 Guidebook is the major reference paper for these questions, although some inferences must be made and the other papers provide further enlightenment.

For each item mark the best response. In some cases more than one answer is correct.

Example:

This paper is a _____.

a) Test
b) Questionnaire
c) Scavenger hunt
d) Way to acquaint one with the process
e) Job application

1. A "need" as defined by the planning process is the same as a (F) (P.6).

a) Goal
b) Program
c) Solution
d) Resource
e) Plan
f) None of these

2. The Comprehensive Planning Process will address itself only to student outcomes.

_____ True (X) False

3. The Board of Education will be encouraged to actively participate in the Comprehensive Planning Process by (d) (P.9).

a) Outlining action plans for the staff
b) Identifying liaisons for each local planning team
c) Approving all priorities
d) Approving systemwide priorities
e) b and c
f) b and d

4. The use of the Comprehensive Planning Process this year will result in (e)(p.1).

a) The Comprehensive Facilities Plan
b) An MCPS Master Plan
c) Long-range plans
d) Forecasting techniques
e) FY 81 plans and budget requests

5. A planner reviews preferred plans with his or her supervisor in (e) (p. 3).

a) Step 6
b) Stage VI
c) Stage III
d) Step 10
e) Stage IV

6. Status reports (relative to the Comprehensive Planning Process) are submitted to one's supervisor (b) Pgs. 13 & 33).

a) Weekly
b) Quarterly
c) Monthly

7. Action plans should contain (check all that apply) (c-d-e)(p. 27-2)

a) Reference to approved purpose
b) Program strengths
c) Objectives
d) Schedule of milestones
e) Advantages and disadvantages

8. A planner should justify needs only with facts not opinions. (p. 7 & inferred)

____ True (X) False

9. The "School Information Summary" and the "Supplement to School Information Summary" contain all of the data elements an MCPS principal (planner) can present to his/her supervisor for verifying needs.

____ True (p. 7) X False

10. Previously approved objectives which remain unmet can be considered needs.

(X) True ____ False (p. 6 "Just What Is A Need, Anyway?")

11. This year only, Step 14 will be done prior to Step 5.

____ True (p. 3) X False

12. Each local planning team must include ten members.

____ True (p. 1) X False

13. The rationale for identifying noteworthy programs is (d)(p. 5).

a) To select persons eligible for stock options
b) To provide recognition for special programs
c) To build upon organizational strengths
d) b and c

14. It is possible to eliminate some present activities as part of the Comprehensive Planning Process.

(p. 3 & 5)
X True ____ False

15. Identify which of the items below represent "Approved Purposes" and should be considered when planning. (pgs. 2 & 4)

- ✓ Program of Studies
- ____ School Information Summaries
- ____ Annual Test Report
- ✓ Board Policies
- ✓ Mission Statements
- ✓ State and Federal Guidelines
- ✓ MCPS Goals of Education
- ____ Digest of Educational Statistics

16. Each planner participating in the initial (pilot) year must do each of the 21 steps. (p. 3)

____ True (X) False

17. Each planner should include in his/her needs assessment all of the possible needs which have been identified. (pgs. 6 & 7)

____ True (X) False

18. An "Indication of Need" form is to be completed for all of the needs which were assessed. (p. 8)

____ True (X) False

19. The Comprehensive Planning Process should result in (a) priorities. (inferred pgs. 5 & 6)

a) A reduction in the number of
b) Each unit having only two
c) 200 MCPS
d) Each unit having 15
e) 25 systemwide

20. "Action Plans" should include (a-c-d). (pgs 27-30)

a) Indication of committment
b) A lot of activity
c) Advantages and disadvantages
d) Estimated costs
e) Reference to an approved purpose

21. The identification of noteworthy programs is optional for the initial year of implementing the Comprehensive Planning Process. (p. 3)

(X) True ____ False

22. MCPS Form 345-51 is optional for the inital year. for the initial year (p. 3 & 19)

X True ____ False

23. The actual topics and categories to use when classifying needs (and on the forms) can be found in the (C) (p.9).

a) Program of Studies
b) MCPS Goals of Education
c) School Information Summaries
d) Operating Budget for FY 79
e) Conceptual Overview
f) MCPS Need Assessment Process

24. Each planner has to complete which of the following forms?

✓ "Action Plan" (C pgs. 1, 3 and 17-33)
____ MGPS Form 345-54
✓ "Indication of Need"
(p.1 optional) ✓ "Planning Team Record"
____ MCPS From 945-63.1A

25. It is suggested that Step 6 be achieved in a face-to-face meeting.

____ True (x) (p.7) False

26. The coordinator of systemwide planning has to approve all plans before they can be presented to the Board.

____ True (X) (inferred) False

27. Within the Comprehensive Planning Process priority has the same definition as objective.

____ True (x) (p.6) False

28. It is possible for a needs assessment to be based solely upon existing data; i.e., not requiring the gathering of additional documentation.

(X) (p.7) True ____ False

29. A needs assessment should always involve a questionnaire to be sent to the community.

____ True (X) (p.7) False

30. Only information supporting a particular need should be given on the "Indication of Need" form.

____ True (X) (p.7) False

31. A planning team which identifies a need outside its mission or realm of authority, should (b) (p.6).

a) Notify either the FBI or Jack Anderson
b) Alert the appropriate planning unit
c) Write a letter to the editor for the local paper
d) Start a petition drive

32. Supervisors collect the priorities of their subdivisions, without comment.

____ True (X) (p.1 & inferred throughout) False

33. The Comprehensive Planning Process is intended to provide the Board of Education with "grassroots input."

(p.1)
X True _____ False

34. A milestone is a e (pgs. 13 & 30).

a) Big rock
b) Part of the "Noteworthy Program" form
c) Term signifying who has prime responsibility for a plan
d) Poorly written objective
e) Major event or activity necessary to achieve an objective

35. A need statement should be approved, if it is in an important area, even though it describes a resource (i.e., "More library books are needed.").

_____ True (X) False (inferred - "Just What Is A Need, Anyway?")

36. As much as possible, need statements should describe gaps between "what is" and "what ought to be."

(inferred p.6 - "Just What Is A Need, Anyway?")
(X) True _____ False

June 18, 1979

MCPS COMPREHENSIVE PLANNING PROCESS

EXTERNAL CONSULTANTS - EDUCATIONAL PLANNING

This paper provides a listing of consultants outside MCPS who could provide assistance to planners. It will be continually updated and should not be viewed as all encompassing. Suggestions of additional consultants or consulting firms will be readily accepted. Generally, management - business - budget - finance - facilities planning consultants were omitted, unless they had experience with other specific planning techniques which would relate to the MCPS Comprehensive Planning Process.

Compiled by:

Dr. Arthur Steller, Coordinator for Systemwide Planning

CONSULTANTS FOR EDUCATIONAL PLANNING

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. Russell Ackoff The Wharton School University of Pennsylvania Philadelphia, Pa. 19104 215-243-7507	Professor Consultant	Author of several books Consultant all over the world	Operations Research All kinds of Planning
Dr. Robert Armacost Baltimore City Schools Center for Planning, Research, and Evaluation #3 East 25th Street Baltimore, MD 21218 301-396-6934	Deputy Superintendent	Present Position	Assessment Systemwide Planning
Dr. Frank Banghart Educational Systems and Planning Center Education Building Florida State University Tallahassee, FL 32306 904-644-6200	Director & Professor	Author of one book Consultant Present Position	Systems Planning
Mr. Roger L. Barton Accountability and Development Dallas Independent School District 3700 Ross Avenue Dallas, Texas 75204 214-824-1620	Associate Superintendent	Present Position	Accountability Systemwide Planning
Dr. Leroy Bell School of Graduate Studies Alabama State University Montgomery, AL 36101 205-262-3581	Dean	Some Consulting	Systemwide Planning

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. Leslee J. Bishop Professor of Curriculum & Planning College of Education University of Georgia Athens, GA 30602 404-542-1343	Professor & Consultant	Consultant for Atlanta, GA Georgia State Dept. of Ed.	Curriculum Planning
Dr. Henry Brinkell Policy Studies in Education Academy for Educational Development 680 Fifth Avenue New York, New York 10019 212-265-3350	Director Educational Consultant	Consultant for various school districts, big project for Brown Deer SD in Wisconsin, some writing and speaking on planning.	Needs Assessment Minimal Standards (Competency Based Education) Evaluation
Dr. Paul Briggs College of Education Arizona State University Tempe, AZ 602-965-3306	Consultant	Retired Superintendent of Cleveland Public Schools (Ohio) Consultant AASA-NASE Professor	General Planning
Dr. Carl Candoli School of Education The University of Kansas Lawrence, KS 66045 913-864-4432	Department Chairman Education Administration	Superintendent of Lansing, Michigan Past President - ISED	General Educational Planning
Dr. Charles Case College of Education University of Wisconsin - Oshkosh Oshkosh, WI 54901 414-424-3322	Dean	Past President ISEP Consultant	Systemwide Planning General Planning

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. Marvin J. Cetron Forecasting International, Ltd. 1001 North Highland Street Arlington, Virginia 22201 703-527-1311	President	Developer of Several forecasting techniques Consultant for small private/industrial organizations, federal government, international agencies, etc.	Technological Forecasting
Dr. Robert J. Chamberlain Lansing Public Schools 519 W. Kalamazoo St. Lansing, MI 48933 517-374-4021	Deputy Superintendent	Present Position	Systemwide Planning
Dr. Richard Chase Department of Management College of Business and Public Administration University of Arizona Tucson, Arizona 85721 606-626-1710	Professor & Department Head	Author of articles on management Consultant for some corporations Consultant for Amphitheater Public Schools (Tucson, Arizona) - Long Range Plan	Operations Research Management
Dr. Roger Clough Mason City Community Schools 120 East State Mason City, IA 515-421-6202	Superintendent	Present Position	Prioritizing Needs Box 1 of our model
Ms. Patricia Craig Center for the Study of Social Policy SRI International 333 Ravenswood Avenue Menlo Park, California 94025 415-326-6200	Senior Policy Analyst	Present Position	Research Needs Assessment Forecasting

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. George Crawford School of Education The University of Kansas Lawrence, KS 66045 913-864-4432	Associate Professor	Author of Planning Monograph - articles	Facility Planning Evaluation Planning
Dr. Luvern Cunningham Professor of Education College of Education The Ohio State University Columbus, OH 43120 614-422-3980	Professor Consultant	Consultant for St. Louis, Toledo, Detroit, etc.	Community Involvement in Planning Staff Seminars
Dr. Robert Curry Cajon Valley Union School District Box 1007 189 Roanoke Road EL Cajon, CA 92022 714-444-9473	Director of Planning Research and Evaluation	Present Position	Needs Assessment
Dr. Linton Deck, Jr. Orange County Public Schools P.O. Box 271 434 North Tampa Avenue Orlando, FL 32802 305-422-3200	Superintendent	Present Position	MBO PERT
Mr. Dennis Detsel McDonald's Corporation McDonald's Plaza Oak Brook, Illinois 60521 312-887-3200	Public Relations Director	Present Position	General Planning
Jesse Dungy, III Office of Planning and Development Bowie State College Bowie, Maryland 20715 301-464-3227	Administrative Planning	Present Position Consultant on Minority	General Planning Systems Analysis

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. John Goode John Goode Associates 1903 Fountain Ridge Chapel Hill, NC 27515 919-929-6373	Consultant	Consulting with 20 school systems Author of several articles Business Consulting	Team Planning AMA Planning
Theordore Gordon The Futures Group 124 Hebron Avenue Glastonbury, CT 06033 203-633-3501	President	Present Position	Long-Range Planning Forecasting
Wallace Hankins 8 Beach Road Severna Park, MD 21146 301-269-2195	Planner - Dept. Budget & Fiscal Planning, State of Maryland	Co-author state planning manual Various govt. planning	Management Planning
Dr. Cecil Hardesty Hardesty & Associates, Inc. 7206 Rue de Roark La Jolla, California 92037 714-459-0030	President	Consulting for various school districts	Enrollment Projections Surveys Management Studies
Dr. L. D. Haskew Educational Administration Education Building 310 University of Texas at Austin Austin, Texas 78712 512-471-1711	Professor Emeritus	Consultant with the Dallas Independent School District (Texas)	General Planning
Dr. Dale Hayes Department of Ed. Administration Teachers College The University of Nebraska Lincoln, NE 68588 402-472-3726	Chairman & Professor	Teaches a course Has several people on his faculty who are educational planners Some consulting	Facilities Planning Systems Planning

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Jefferson Eastmond World-Wide Education and Research Institute 2315 Stringham Avenue Salt Lake City, Utah 84109 801-486-6066	Consultant	Consultant for various school systems.	Needs Assessment
Dr. Fenwick English Peat, Marwich, Mitchell & Co. 1990 K Street, N.W. Washington, D.C. 20006 202-223-9525	Educational Consultant	Needs Assessment (author) PMM has a variety of experience mostly outside of education	Needs Assessment
Dr. Nolan Estes Educational Administration Education Building University of Texas at Austin Austin, Texas 78712 512-471-1711	Professor	Past Superintendent of Dallas	Systemwide Planning
Dr. Max Evans College of Education Ohio University Athens, Ohio 45701 614-594-5289	Professor	Consultant for Phi Delta Kappa's Educational Planning Model, various consulting and former superintendent	PDK's Planning Model Goal Ranking/Rating Strategy
Dr. Richard Featherstone College of Education Michigan State University East Lansing, MI 48824 517-355-1855	Professor Executive Secretary for the International Society for Educational Planners	Author of Educational Planning Book Consultant for various school systems & Higher Education	Long-Range Planning [illegible]nning Process [illegible]gher Education)
Eva Freund Kupferberg/Freund Assoc., Inc. 849 North Jacksonville St Arlington, VA 22205 703-525-8045	Consultant	Workshop Trainer	Strategic Planning
Dr. John Gibson School of Graduate Studies Alabama State University Montgomery, AL 36101 205-262-3581	Professor	Some Consulting	Systemwide Planning

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. Melvin Heller Department of Administration College of Education Loyola University Chicago, Illinois 60611 312-670-3000	Chairman & Professor	Consulting Author of some articles	Decision-Making General Planning
Irving W. Herrick Planning and Technical Development Office of Developmental Projects Maryland State Department of Education P.O. Box 8717, BWI Airport Baltimore, Maryland 21240 301-796-8300	Administrator	Present Position	General Planning
Dr. William Hitt Battelle Center for Improved Education 505 King Avenue Columbus, OH 43201 614-424-6424	Director	Present Position Consulting	PPBS MBO Needs Assessment Systemwide Planning Computer Systems
Dr. Homer Johnson Associates, Inc. Administrative Services 465 Pacific Street Monterey, CA 93940	Educational Consultant	Consulting with a variety of school systems	Facilities Planning Administrative Salary Studies Some Master Plans
Dr. Clifford Jones Educational Self-Development 315 South Maple Avenue Greensburg, PA 15601 412-836-3462	Educational Consultant	Consultant with many school systems on planning	Master Plans - Long-Range Planning
Dr. Bernard Kaplan 4219 South Street Marcellus, NY 12108 315-673-4433	Educational Consultant	Deputy Assistant Commissioner State of NJ ISEP - President, Executive Secretary NJ Planning Consulting	Comprehensive Educational Planning Needs Assessment Participatory Decision Making

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. Roger Kaufman Center for Needs Assessment and Planning The Florida State University Tallahassee, FL 32306 904-644-6200	Director & Professor	Author of 2 books on Planning Consultant	Systems Approach to Planning Needs Assessment
Dr. Gerald N. King Dallas Independent School District 3700 Ross Avenue Dallas, Texas 75204 214-824-1620	Controller	Present Position	Futuristic Forecasting Budget Planning
Dr. Stephen Knezevich School of Education University of Southern California Los Angeles, CA 90007 213-746-6741	Dean	AASA-NASE Professor Consultant Author	MBO General Planning
Dr. Leon Lessinger College of Education University of South Carolina Columbia, South Carolina 29208 803-777-7481	Dean	Author of several books and articles NASE-AASA speaker Consultant	Accountability
W. F. Mason The Mitre Corporation Metrek Division 1820 Dolley Madison Boulevard McLean, Virginia 22102 703-827-6000	Technical Director Systems Development	Present Position	Delphi Technique Identifying Research Objectives Planning of Research
Dr. Marvin Matthews Education Planning Center Division of Curriculum & Instructional Services Los Angeles County Education Ctr. 9300 East Imperial Highway Downey, CA 90242 213-922-6324	Director Planning Center	Some Consulting Present Position	Systems Approach to Planning Needs Assessment

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. James McNamara Texas A&M University College Station, TX 77841 713-845-5400	Professor	AASA-NASE Professor Consulting (some) Author	Long-Range Planning Futures Planning
Dr. Donald Michael Program in Urban & Regional Planning Samuel Trask Dana Building The University of Michigan Ann Arbor, Michigan 48104 313-763-4190	Professor of Planning and Public Policy Professor of Psychology	Author Consulting	General Planning
Mr. M. Wayne Neff Division of Program Planning and Development Bureau of Planning and Evaluation Department of Education Box 911 Harrisburg, PA 17126 717-787-7372	Coordinator, Long-Range Planning	Present position in state department and working with local districts	Long-Range Planning
Dr. Arthur Partridge Educational Planning Service College of Education University of Northern Colorado Greeley, CO 80631 303-351-3862	Director Professor	Consulting Present Position	Facilities Planning Enrollment Forecasts General Planning
Predicasts, Inc. 200 University Circle Research Center 11001 Cedar Avenue Cleveland, Ohio 44106 216-795-3000 (Statistical/Forecast Giving Summaries of Indicators)			

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Proaction Institute Center for the Study of Community and Education Planning Erickson Hall Michigan State University East Lansing, Michigan 48824 517-355-1855			
Dr. Charles Proctor 429 Southwest Drive Silver Springs, Maryland 301-593-4158	Educational Consultant	Montgomery County Public Schools (Maryland)	Management-By-Objectives MCPS Comprehensive Planning Process
Dr. Bruce Read Educational Systems Associates 223 E. Anderson Lane Suite 208 Austin, TX 78752 512-345-7652	President	AASA-NASE Professor Consultant	General Planning Needs Assessment
Dr. George Redfern P.O. Box 9573 Arlington, VA 22209 703-528-6000	Educational Consultant	Consultant with various systems on planning - also personnel evaluation	Systems Approach for Accountability MBO
Dr. Roger Schurrer North Carolina State Department of Education Raleigh, NC 27611 919-733-3813	Director - State Dept.'s Division of Planning	Comprehensive Education planning on state level Handbook for Local Districts	Comprehensive Educational Planning
Mr. Hugh Schwartz c/o The Coca-Cola Company P.O. Box 3216 Forest City, FL 32751 305-852-8400	Consultant	Former Director of Corporate Long-Range Planning	Corporate Long-Range Planning Monitoring and Forecasting The Business Environment
Dr. Michael Scriven Evaluation Institute University of San Francisco San Francisco, CA 94117 415-[illegible]5	Director Professor	Consultant Speaker Writer	Evaluation Needs Assessment Futures

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. Herbert Sheathelm Department of Educational Adm. School of Education The University of Connecticut Storrs, CT 06268 203-486-3137	Professor	Teaches a course Some consulting	Facilities Planning Teacher Evaluation Problem-Solving
Dr. Ken Simmons Charles W. Williams, Inc. Policy Research & Assistance Suite 117-118 801 North Pitt Street Alexandria, VA 22314 703-548-2501	Consultant	Management & Government Consultant	Systems Analysis Operations Research Forecasting Research Computer Systems
W. W. Simmons W. W. Simmons, Inc. 22 Greenwich Plaza Greenwich, CT 06830 203-661-9710	Consultant Author	Author Consultant for Various Businesses	Long-Range Planning Corporate Planning Strategic Planning
Robert Stilger Northwest Regional Foundation North 910 Washington Spokane, Washington 99201 509-327-5596	Executive Director	Present Position	Citizen Participation in Planning Governmental Goal-Setting
Dr. Daniel Stufflebeam Director of Evaluation Center College of Education Western Michigan University Kalamazoo, Michigan 49008 616-383-1600	Professor Consultant	Author of articles Consultant for Dallas, Texas; Toledo, Ohio etc.	Evaluation Planning Decision Making
Mr. Sherman D. Taffel Office of Advanced Planning and Development Center for Planning, Research and Evaluation Baltimore City Public Schools 3 East 25th Street Baltimore, Maryland 21218 301-396-3100	Systemwide CPM Coordinator	Present Position	Critical Path Method MBO Systemwide Planning

Name, Address and Phone Number	Present Position	Planning Experience	Planning Emphasis
Dr. C. Kenneth Tanner Department of Educational Administration and Supervision College of Education The University of Tennessee Knoxville, Tennessee 37916 615-974-2214	Professor	Author of assorted articles and two book. Consultant for a variety of school systems and organizations	Operations Research Computer Utilization General Planning Futuristic Planning MBO Delphi Technique Cost Effectiveness
Dr. James Tanner Cleveland Public Schools Cleveland, Ohio 44118 216-696-2929	Deputy Superintendent	Present Position	General Planning
Dr. Sanford Temkin Research for Better Schools, Inc. 1700 Market Street Philadelphia, Pennsylvania 19103 215-561-4100	Educational Consultant	Consultant for various school systems and organizations. Author of a variety of planning materials.	Curriculum Planning General Planning Forecasting
Dr. Conrad Toepfer Department of Curriculum and Instructional Media State University of New York Amherst, New York 14226 716-831-9000	Professor	AASA-NASE Speaker Author	General Planning
Michael Tribbey Topeka Public Schools 624 West 24th Street Topeka, Kansas 66611 913-233-0313	General Director of Planning & Evaluation Services	Present Position Formerly with the Dallas Independent School District (Texas)	Systemwide Planning
Dr. Edwin West, Jr. Highpoint Public Schools P.O. Box 789 Highpoint, NC 27261 919-885-5161	Superintendent	Present Position AASA-NASE Professor	Developmental PIanning Process
Dr. James Zaharis Mesa Public Schools Mesa, Arizona 85201 60 116	Associate Superintendent	AASA-NASE Speaker Present Position	Needs Assessment

General Consulting Firms

American Management Associations
135 West 50 Street
New York, NY 10020
212/586-8100

Battelle Institute
Center for Improved Education
505 King Avenue
Columbus, OH 43201
614/424-6424

Arthur D. Little, Inc.
Acorn Park
Cambridge, MA 02140
617/864-5770

National Academy for School Executives
American Association of School Administrators
1801 North Moore Street
Arlington, Virginia 22209
703/528-0700

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